

TRAILWEST
— BANK —



SimpleSwitch



Make the SimpleSwitch to TrailWest Bank today!



Welcome to SimpleSwitch, a step by step guide to help make your transition to TrailWest Bank as easy as possible. Follow these simple steps and your new account(s) will be ready to use before you know it!

Let's Get Started:

Step 1: Stop by one of our convenient branches and meet with a friendly Customer Service Representative to open your new TrailWest Bank account(s).

What will you need to bring with you?

1. A current Government-Issued Photo ID (i.e. drivers license or passport)
2. Cash or check to fund your new TrailWest Bank account(s).*

* Minimum opening deposits vary. Please consult our Personal Banking Brochure or ask a Customer Service Representative how much your minimum opening deposit will be.

Step 2: Sign Up for TrailWest Bank's Online/Mobile Banking.

With Online/Mobile Banking, you can easily track your direct deposits, automatic payments, and checks as they clear your TrailWest Bank account(s).

There are 2 simple ways to sign up:

1. Sign up with your Customer Service Representative while opening your new account.
2. Visit our website (trailwest.bank), select "Online & Mobile Banking," and "Sign Up."

** Don't forget to download the TrailWest Bank Mobile App on your iOS or Android mobile devices. The TrailWest Bank Mobile App gives you access to your account when you are on the go!

Step 3: Use the SimpleSwitch checklist as a quick reference to easily switch your Direct Deposits and Automatic Payments to your new TrailWest Bank account.

- Use the attached Direct Deposit Authorization Change Form to switch your direct deposits with your employer, etc. Use one form for each depositor.
- Use the attached Automatic Payment Change Form to switch any automatic payments or withdrawals. Use one form for each withdrawal.

Step 4: Start using Bill Pay through TrailWest Bank's Online/Mobile Banking.

If you have automatic payments, you may want to consider using Bill Pay. With, Bill Pay you retain control of whom you pay and when, with one-time or recurring payment options available. It is free and simple to use!

Follow these easy steps to get started today:

1. Select "Transactions" on your Online/Mobile Banking Menu.
2. Select "Bill Payment."
3. Select the account you would like to pay bills from.
4. Add your payee(s) and you are off and running!

Step 5: Close your old account(s) at other financial institution(s).

- Use the attached Close Account Request Form to close your account(s) at the other financial institution(s).*

* Before you send the Close Account Request Form, be sure all outstanding checks and debits have cleared, and all automatic deposits or withdrawals have been switched to your new TrailWest Bank account. TrailWest Bank is not responsible for charges incurred due to insufficient funds.

* Remember to shred or destroy any checks and/or debit cards from your old account(s) after they have been closed!

Step 6: Enjoy the benefits of your new TrailWest Bank account(s). We are looking forward to serving you!

Use this checklist to help you identify direct deposits and/or automatic withdrawals you will need to switch to your new TrailWest Bank account(s).



Who makes direct deposits into your account?

<u>Payment Type</u>	<u>Company Name</u>	<u>Phone Number</u>
Employee Payroll		
Pension/Retirement		
Social Security		
Investment Income		
Other:		
Other:		
Other:		
Other:		

Who withdraws automatic payments from your account or debit card?

<u>Payment Type</u>	<u>Company Name</u>	<u>Phone Number</u>
Mortgage/Rent		
Auto Loan		
Credit Card 1		
Credit Card 2		
Utility 1		
Utility 2		
Cable/TV		
Internet		
Water/Sewer		
Trash Removal		
Gym Membership		
Daycare		
Other:		

Direct Deposit Change Request



Date: _____

Employer/Depositor Name: _____

Address: _____

City: _____ State: _____ Zip: _____

To Whom it May Concern,

Please accept this letter as my authorization to change my direct deposit effective immediately.

Please change my direct deposit to:

TrailWest Bank

PO Box 9

Lolo, MT 59847

Checking Account Account # _____

Savings Account Account # _____

Routing# 092901560

From:

Previous Financial Institution: _____

Previous Account # _____

Previous Routing # _____

If you have any questions regarding this request, please contact me by phone at () ____ - _____. Thank you.

Sincerely,

X _____

Printed Name: _____



Automatic Payment Change Request

Date: _____

Company Name: _____

Address: _____

City: _____ State: _____ Zip: _____

To Whom it May Concern,

Please accept this letter as my authorization to change my automatic payment effective immediately.

Please change my automatic payment to:

TrailWest Bank

PO Box 9

Lolo, MT 59847

Checking Account Account # _____

Savings Account Account # _____

Routing# 092901560

From:

Previous Financial Institution: _____

Previous Account # _____

Previous Routing # _____

If you have any questions regarding this request, please contact me by phone at () ____ - _____. Thank you.

Sincerely,

X _____

Printed Name: _____



Close Account Request

Date: _____

Financial Institution Name: _____

Address: _____

City: _____ State: _____ Zip: _____

To Whom it May Concern,

Please accept this letter as my request to close the account listed below at your institution.

Account # _____

Account Type: Checking Savings CD
 Money Market Other: _____

Please send a check in the amount of the account balance plus any accrued interest (if applicable) to be deposited at TrailWest Bank.

TrailWest Bank
Attn: SimpleSwitch
PO Box 9
Lolo, MT 59847

If you have any questions regarding this request, please contact me at the phone number listed below.

Sincerely,

X _____

Printed Name _____ Phone # () _____ - _____