



ACCOUNT TRANSFER APPLICATION & CHECKLIST

Start experiencing the AIB&M difference – make your move today!

Our account transfer process is a FREE tool that allows you to quickly and easily change your checking account(s) from your current financial institution to American Investors Bank & Mortgage!

Simply follow these steps:

(1) Fill out an NEW ACCOUNT APPLICATION and fax or mail it to

AIB&M at: (952) 945-6450 (fax)

American Investors Bank & Mortgage
4920 Lincoln Drive, Edina, MN 55436

An Account Specialist will then call you to complete the account opening process.

Once your account has been established...

(2) Complete the DIRECT DEPOSIT CHANGE form.

You will need to complete a form for each direct deposit you currently have established, including payroll, automatic deposits, or dividends. A voided check from your new AIB&M account is required.

(3) Complete the AUTOMATIC WITHDRAWAL CHANGE form.

You will also need to complete a form for any established automatic withdrawals including payments for services/items such as:

- mortgage/rent
- association fees
- internet
- investments
- utilities (electric, gas, water)
- online bills
- vehicle payments
- membership dues
- cable TV/satellite
- credit cards

(4) Complete the CLOSE ACCOUNT REQUEST form.

When closing your other account, please make sure all outstanding checks/payments have cleared.

(5) Send forms to relevant organizations/companies/financial institutions.