EFT–Automatic Withdrawals

Electronic Payment Option

Why EFT-Automatic Withdrawals?

Montgomery Insurance™ now offers EFT-Automatic Withdrawals, the fast, free, convenient way to pay your insurance premiums by automatically withdrawing them from your checking account.

Payment Security

When you choose EFT-Automatic Withdrawals to make your premium payments, you will never need to worry about the security of your payment. We ensure the security of your account by utilizing industry standard techniques to protect your transactions. We also maintain physical, electronic, and procedural safeguards to guard your data.

Your Independent Agent

Through our commitment to the independent agency system, we have established a strong agency force of the most knowledgeable insurance professionals in the insurance industry. Montgomery Insurance sells only through independent agents, ensuring that you receive the best advice from objective agents representing a variety of insurance companies.

Financial Strength

Montgomery Insurance member companies have earned financial ratings of A (Excellent) from A.M. Best Company, the industry standard for financial strength.

One less check to write, one less stamp to buy, one less payment to mail, one less service fee to pay…

Frequently Asked Questions

Q How do EFT-Automatic Withdrawals work?
A With your authorization, your insurance premium will be transferred from the checking account of your choice either in full, or on a monthly basis. You will receive at least ten days notification before your first withdrawal will occur.

Q How do I know my bill is paid?
A Your payment information is itemized on your checking account statement.

Q With EFT-Automatic Withdrawals, how do I plan my finances to ensure I will have enough money in my account on the date the payment will be withdrawn?
A Your payment will be made on the same day of each month so that you can plan accordingly. If you are still concerned, we provide an option during enrollment that will allow you to receive a notice a minimum of ten days in advance of each deduction. We'll also notify you if there is a change in your withdrawal amount in excess of $15.00.

Q Are there any fees with EFT-Automatic Withdrawals?
A No, another advantage of this option is there are no service charges or installment fees for EFT-Automatic Withdrawals.

Q How are audits handled?
A At the time an audit is processed, a special billing notification will be sent to you prior to the issuance of the withdrawal notice. This special audit notification will provide you with additional time you may need to review the audit prior to the actual withdrawal. Audits will be withdrawn in full. If you have any questions regarding audit withdrawal, please contact our Billing Service Center.

Q Is the EFT-On Demand payment option still available?
A Yes, if you want to continue to initiate your payments, but don't want to write a check, you can use the EFT-On Demand option to have your payment withdrawn anytime after you receive your bill.

Q How do I enroll in the EFT-Automatic Withdrawals option?
A To place your policy on EFT-Automatic Withdrawals or have your current installment taken out of your checking account, you may log into the Online Billing Service Center, select the "Make Payment / Manage Payment Options" tab, and select either "Setup EFT-Automatic Withdrawals" or "Make an On Demand Payment". You can also enroll in EFT-Automatic Withdrawals by phone or mail. To enroll by phone, contact your local agent or call the Montgomery Insurance Billing Service Center. Phone numbers are on the front of your invoice. To enroll by mail, fill out this simple form and send it with your payment.

Q What if I wish to discontinue EFT-Automatic Withdrawals?
A You may opt out of EFT-Automatic Withdrawals at any time by logging into the Online Billing Service Center, selecting the "Make Payment / Manage Payment Options" tab, and selecting "Stop Automatic Withdrawals".

Montgomery Insurance Member Underwriting Companies:
American Economy Insurance Company, American Fire and Casualty Company, American States Insurance Company, American States Insurance Company of Texas, American States Preferred Insurance Company, Consolidated Insurance Company, Excelsior Insurance Company, First National Insurance Company of America, General Insurance Company of America, Indiana Insurance Company, The Midwestern Indemnity Company, Montgomery Mutual Insurance Company, The Netherlands Insurance Company, The Ohio Casualty Insurance Company, Ohio Security Insurance Company, Peerless Indemnity Insurance Company, Peerless Insurance Company, Safeco Insurance Company of Illinois, West American Insurance Company
(Not all companies may be licensed in all states.)

13830 Ballantyne Corporate Place
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Charlotte, NC 28277-2711
877-675-4411

www.montgomery-ins.com

Trusted Choice®

Montgomery Insurance®
Member of Liberty Mutual Group

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Enroll Online Today by Visiting www.montgomery-ins.com/billing

You can also enroll by calling your local agent or the Montgomery Insurance Billing Service Center at 877-675-4411, or completing this simple form and sending it in with your payment.

EFT-Automatic Withdrawals Enrollment Authorization Form

Agency Name: _____

Named Insured: _____ Account No: _____

Address: _____

City, State, Zip: _____

Business Phone: _____

I (we) authorize Montgomery Insurance™* to initiate EFT-automatic withdrawals from the banking account listed below as payment when my (our) Montgomery Insurance policy(ies) become due. I (we) authorize the financial institution on which my check is drawn to accept these deductions initiated by Montgomery Insurance.

Bank Name: _____

Bank Routing Number: _____

Checking Account Number: _____

NOTE: IN ORDER TO PROPERLY PROCESS YOUR APPLICATION, YOU MUST ATTACH A VOIDED CHECK.

International ACH Transactions

- Is this transaction going to be withdrawn from/deposited to a bank outside of the United States? ❑ Yes ❑ No
- Does this bank account have standing orders to move funds from the account we debited/credited to a bank outside of the United States?
  ❑ Yes ❑ No

NOTE: The withdrawal day will be automatically set for the account and can only be modified by a customer service representative. If the withdrawal day is the 29th, 30th, or 31st and this particular day does not exist for a particular month, or if the withdrawal day falls on a weekend or holiday, that withdrawal will occur on the next business day.

I (we) make this authorization subject to the following conditions:

- This authorization may be terminated at any time by written notification to Montgomery Insurance. Notification to terminate automatic deductions must be received at least 10 days prior to the next deduction to prevent the deduction from occurring.
- Please select the following option, if desired.

  ❑ I would like Montgomery Insurance to notify me, in writing, of all withdrawals. The notice will be issued a minimum of 10 days in advance of the planned withdrawal.

- PAY PLAN (select one): ❑ Annual ❑ Monthly

**The default pay plan includes 12 equal installments.*

Customer Signature: _____ Date: _____

Account Holder Signature: _____ Date: _____
(If other than insured)

Note: The completed form and a voided check can be mailed or faxed to us at Montgomery Insurance, Billing Service Center, PO Box 2051, Keene, NH 03431-7051. Fax Number: 603-358-3855. Or you can enroll automatically at www.montgomery-ins.com/billing and avoid having to complete or mail any documents.

* Includes member companies such as American Economy Insurance Company, American Fire and Casualty Company, American States Insurance Company, American States Insurance Company of Texas, American States Preferred Insurance Company, Consolidated Insurance Company, Excelsior Insurance Company, First National Insurance Company of America, General Insurance Company of America, Indiana Insurance Company, The Midwestern Indemnity Company, Montgomery Mutual Insurance Company, The Netherlands Insurance Company, The Ohio Casualty Insurance Company, Ohio Security Insurance Company, Peerless Indemnity Insurance Company, Peerless Insurance Company, Safeco Insurance Company of Illinois, West American Insurance Company