

Withdrawal Process

Option 1: Email

- Provider determines which branch location the withdrawal will take place. Search [branch locations here](#).
- Provider sends the completed Umpqua IDA/MISA Withdrawal Authorization Form to digitalbranchbusinessRM@umpquabank.com. Email must include the following:
 - Savers' name
 - Branch location Saver will be visiting.
 - Attach the signed Umpqua IDA/MISA Withdrawal Authorization Form.
 - If known - expected date and time Saver will visit the branch.
- Digital Branch Business Relationship Manager forwards completed Umpqua IDA/MISA Withdrawal Authorization Form to the Branch the Saver will be visiting.
- Saver visits Branch. Note - Saver must present valid I.D. in person.
- Branch completes call back verification to authorized individual with the Provider Organization, if necessary, and processes the withdrawal.

Option 2: Fax

- Provider calls Branch where withdrawal will take place to notify them of the transaction, and obtain fax number. Search [branch locations here](#).
- Provider faxes completed IDA/MISA Withdrawal Authorization Form to Branch.
- Saver visits branch. Note – Saver must present valid I.D. in person.
- Branch completes call back verification to authorized individual with the Provider Organization, if necessary, and processes the withdrawal.

Option 3: In-person

- Provider completes Umpqua IDA/MISA Withdrawal Authorization Form and either:
 - a. Emails completed form to Saver to be printed, or,
 - b. Provider prints form and delivers to Saver.
- Provider emails a notification to digitalbranchbusinessRM@umpquabank.com. Email must include the following:
 - Savers name
 - Branch Location Saver will be visiting.
 - If known - expected date and time Saver will visit the branch.
 - Optional, but encouraged - attach the signed Umpqua IDA/MISA Withdrawal Authorization Form.
- Saver brings completed Umpqua IDA/MISA Withdrawal Authorization Form and valid I.D. to local branch to request the withdrawal.

- Branch completes call back verification to authorized individual with the Provider Organization, if necessary, and processes the withdrawal.

**Umpqua Branch Associate will call authorized individual with Provider organization to confirm withdrawal requests over \$2,000 on the Umpqua Bank Authorization Letter.

**Umpqua Branch Associate will call authorized individual with Provider organization to confirm the withdrawal for any amounts that are not presented on the Umpqua Bank Authorization Letter.