



Customer Information Worksheet – Business Authorized Signer

IMPORTANT INFORMATION ABOUT PROCEDURES FOR OPENING A NEW ACCOUNT

Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who is a signer on an account. What does this mean for you? When you open an account, we will ask for your name, address, date of birth, and other information that will allow us to identify you. Each signer must fill out a separate form. **We will also require a copy of your driver’s license or other state/federal issued identifying documents.**

Required Information	
Name: First Name Middle Initial Last Name	First Name Middle Initial Last Name
Position Held/Title at Company:	Position/Title
Email:	Email Address
Home Phone:	xxx-xxx-xxxx
Business Phone:	xxx-xxx-xxxx
Mobile Phone:	xxx-xxx-xxxx
Personal Address* (May NOT be a PO Box):	Number and street name
City, State, Zip:	City State Zip Code
Mailing Address (If Different than Personal Address, May be a PO Box):	Number and street name
City, State, Zip:	City State Zip Code
Date of Birth:	Date of Birth
Tax ID Number/Social Security Number:	xxx-xx-xxxx
Country of Citizenship:	Country of Citizenship
Employer:	Name of Employer
Employer Address:	Number and street name
City, State, Zip:	City State Zip Code
Security Question: Mother’s Maiden Name:	Mother’s Maiden Name

*If mailing address does not match address on Driver’s License, proof of address, such as a copy of a utility bill, will be required.

Signature of Signer

Date _____