

# ACCOUNT INFORMATION WORKSHEET



Utilize this worksheet to collect all of the account information for your new account in one place. Then bring this worksheet with you when you open your account to make the opening process a breeze. All Owners, Transactors, and Information Users will need to be present at account-opening to sign the Member Service Agreement.

<b>Owner or Additional Owner</b>	<i>Ownership of the funds in the account as well as the ability to take action, conduct transactions, and use the account products and services.</i>
<b>Transactor</b>	<i>Designated by an Owner or Additional Owner to conduct transactions on the account.</i>
<b>Information User</b>	<i>Designated by an Owner or Additional Owner to access information about the account products and services used by the Owner, Additional Owner(s), and Transactor(s).</i>
<b>Beneficiary</b>	<i>A person or organization designated by an Owner or Additional Owner to receive the funds upon the death of the Owner (or last Additional Owner) on an account.</i>

## OWNER 1 INFORMATION CURRENT MEMBER WITH ACCU? Yes No

LEGAL NAME (match to ID provided):		SSN:		DOB:		MOTHER'S MAIDEN NAME:	
PHYSICAL ADDRESS:			CITY:		STATE:	ZIP:	HOME PH:
MAILING ADDRESS (if applicable):			CITY:		STATE:	ZIP:	CELL PH:
DRIVER'S LICENSE #:	DL STATE:	DL ISS:	DL EXP:	EMAIL:			
EMPLOYER / RETIRED FROM:			OCCUPATION / PROFESSION:			WORK PHONE:	

## ADDITIONAL OWNER TRANSACTOR INFORMATION USER CURRENT MEMBER WITH ACCU? Yes No

LEGAL NAME (match to ID provided):		SSN:		DOB:		MOTHER'S MAIDEN NAME:	
PHYSICAL ADDRESS:			CITY:		STATE:	ZIP:	HOME PH:
MAILING ADDRESS (if applicable):			CITY:		STATE:	ZIP:	CELL PH:
DRIVER'S LICENSE #:	DL STATE:	DL ISS:	DL EXP:	EMAIL:			
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## BENEFICIARY

LEGAL NAME:	SSN:	DOB:
RELATIONSHIP TO OWNER 1:		

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