

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.

Owner or Additional Owner	<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>
Transactor	<i>Designated by an Owner or Additional Owner to conduct transactions on the account.</i>
Information User	<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>
Beneficiary	<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? <input type="checkbox"/> Yes <input type="checkbox"/> No	
LEGAL NAME			SOCIAL SECURITY NUMBER		DATE OF BIRTH		
PHYSICAL ADDRESS		CITY	STATE	ZIP	EMAIL ADDRESS		
MAILING ADDRESS		CITY	STATE	ZIP	HOME PHONE	CELL PHONE	
DRIVER'S LICENSE (DL) NUMBER		DL STATE	DL EXPIRATION		MOTHER'S MAIDEN NAME		
EMPLOYER / RETIRED FROM			OCCUPATION / PROFESSION			WORK PHONE	

<input type="checkbox"/> ADDITIONAL OWNER <input type="checkbox"/> TRANSACTOR <input type="checkbox"/> INFORMATION USER						CURRENT MEMBER WITH ACCU? <input type="checkbox"/> Yes <input type="checkbox"/> No	
LEGAL NAME			SOCIAL SECURITY NUMBER		DATE OF BIRTH		
PHYSICAL ADDRESS		CITY	STATE	ZIP	EMAIL ADDRESS		
MAILING ADDRESS		CITY	STATE	ZIP	HOME PHONE	CELL PHONE	
DRIVER'S LICENSE (DL) NUMBER		DL STATE	DL EXPIRATION		MOTHER'S MAIDEN NAME		
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DRIVER'S LICENSE (DL) NUMBER		DL STATE	DL EXPIRATION		MOTHER'S MAIDEN NAME		
EMPLOYER / RETIRED FROM			OCCUPATION / PROFESSION			WORK PHONE	

BENEFICIARY			
LEGAL NAME		SOCIAL SECURITY NUMBER	DATE OF BIRTH
RELATIONSHIP TO OWNER 1			

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