

New Account Business Client Information



Note: All personal information is held securely, is confidential and treated appropriately.

Client Information

Business Legal Name _____

DBA (if applicable) _____

Special Account Title _____

Physical Address _____

Mailing address (if different from physical address) _____

Employer Identification Number (ITIN) _____

Nature of Business _____

Name of Authorized Signers _____

Title of Authorized Signers _____

Contact Details

Business Phone number _____

Email _____

New Account Documentation

- Authorized Signers information (see note below)
- Completed and signed W-9
- Appropriate account documents based on business type:
 - Corporations: Articles of Incorporation, corporate resolution, bylaws
 - LLC/LLP: Articles of Organization, Operation Agreement,
 - Sole-proprietorship: Assumed Name Certificate

Remote Deposit Capture (RDC) Required Documentation

- 3 month of most recent bank statements
- 2 years of most recent bank statements
- Year to date P&L Statement

Note: Please collect additional required information using the "New Account Personal Client Information" for each authorized signer on the new business account.

Please select from the account options below

Business Accounts

- Small Business Checking
- Preferred Business Checking
- Community Partner Checking
- Business Money Market Account
- Certificate of Deposit