

## New Account Worksheet

Please e-mail completed worksheet to [newaccounts@bankoflafayette.com](mailto:newaccounts@bankoflafayette.com) or fax to 706-639-0134

Please complete for each signer on account.

Federal law requires us to obtain sufficient information to verify the identity of all signers. Please provide us with a copy of your Driver's License, State Issued Photo ID or Passport. If your address does not match what is listed on your photo ID, we also require address verification by means of a document such as a utility bill showing your current address.

Name: \_\_\_\_\_

Relationship/Ownership of Account:  Individual  Joint with Survivorship (not as tenants in common)

Joint with No Survivorship (as tenants in common)  Trust – Separate Agreement Dated: \_\_\_\_\_

Corporation – For Profit  Corporation – Nonprofit  Partnership  Sole Proprietorship  Limited Liability Company

Signer only  Other \_\_\_\_\_

Physical Address: \_\_\_\_\_

Mailing Address if different than physical: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Mobile Phone: \_\_\_\_\_ Business Phone: \_\_\_\_\_

Birth Date: \_\_\_\_\_ Social Security Number / TIN: \_\_\_\_\_

Driver's License #: \_\_\_\_\_ State Issued \_\_\_\_\_ Issue Date \_\_\_\_\_ Exp. Date \_\_\_\_\_

E-mail address: \_\_\_\_\_

Employer: \_\_\_\_\_

Occupation: \_\_\_\_\_

Type of Account: \_\_\_\_\_

Beneficiary Designation *if applicable*: \_\_\_\_\_

Type of Account: *Please refer to the Service Link on the Bank's website for a list and description of the accounts offered.*

Personal Checking  Ultimate Checking  Complete Customer Checking  Prestige Account  Senior Checking

Student Checking  NOW Account  MMDA  Commercial Checking  Statement Savings  Certificate of Deposit

Individual Retirement Account

