

Personal Information Worksheet

What you will need to do

The following worksheet identifies the information you will want available when you open your account. Most of this information is also helpful when switching automatic transfers (debits and credits) to and from your old account.

A check or deposit ticket from your present account is helpful, and a copy of a recent monthly activity statement helps also.

For an Individual Account

Name

Street Address
City, State, Zip

Home Phone

Work Phone

Cell Phone (optional)

Email Address (optional)

Social Security Number

Employer

Date of Birth _____

For the co-owner on a Joint Account

Name

Street Address
City, State, Zip

Home Phone

Work Phone

Cell Phone (optional)

Email Address (optional)

Social Security Number

Employer

Date of Birth _____