



Getting to Know Your Business

Crest Saving Bank provides our customers with a choice of products and performance- enhancing options to help you manage and grow your business. To get started, we would like to learn some details about your company.

Business Info:

Company Name: (Legal name) _____

Doing Business As: _____

Type of Business: __ Corporation __ LLC __ Partnership __ Unincorporated Org/Assoc **EIN:** _____

Business Address: _____

Mailing Address: _____

Telephone #: _____ Fax #: _____

Website: _____ Email Address: _____

Nature/Description of Business: _____ NAICS Code: _____

Names of Corporate Officers

Title and Position

_____	_____
_____	_____
_____	_____
_____	_____

Authorized Signers:

Name _____ SSN _____ DOB _____

Home Address _____

Home Phone _____ Cell Phone _____ Work Phone _____

Email: _____ Mother's Maiden Name _____

ID Type 1 _____ Issue Date _____ Exp Date _____

ID Type 2 _____ Issue Date _____ Exp Date _____

Employer: _____ Occupation _____

Name _____ SSN _____ DOB _____

Home Address _____

Home Phone _____ Cell Phone _____ Work Phone _____

Email: _____ Mother's Maiden Name _____

ID Type 1 _____ Issue Date _____ Exp Date _____

ID Type 2 _____ Issue Date _____ Exp Date _____

Employer: _____ Occupation _____

Name _____ SSN _____ DOB _____

Home Address _____

Home Phone _____ Cell Phone _____ Work Phone _____

Email: _____ Mother's Maiden Name _____

ID Type 1 _____ Issue Date _____ Exp Date _____

ID Type 2 _____ Issue Date _____ Exp Date _____

Employer: _____ Occupation _____



ACCOUNTS AND SERVICES

Accounts and Services that you currently use or are interested in:

- | | | | |
|--------------------------|-----------------------------------|--------------------------|---------------------------|
| <input type="checkbox"/> | Regular Checking Account | <input type="checkbox"/> | ATM Card |
| <input type="checkbox"/> | Interest Bearing Checking Account | <input type="checkbox"/> | Debit Card |
| <input type="checkbox"/> | Savings Account | <input type="checkbox"/> | Internet Banking |
| <input type="checkbox"/> | Individual Retirement Account | <input type="checkbox"/> | Mobile Banking |
| <input type="checkbox"/> | Certificate of Deposit | <input type="checkbox"/> | Online Bill Pay |
| <input type="checkbox"/> | Christmas Club | <input type="checkbox"/> | Online Statements |
| <input type="checkbox"/> | Escrow Accounts | <input type="checkbox"/> | Phone Link |
| <input type="checkbox"/> | Business Accounts | <input type="checkbox"/> | Text Banking |
| <input type="checkbox"/> | Merchant Services | <input type="checkbox"/> | Overdraft Protection |
| <input type="checkbox"/> | Investment Services | <input type="checkbox"/> | Safe Deposit Box |
| <input type="checkbox"/> | Trust Services | <input type="checkbox"/> | Mobile Deposit |
| <input type="checkbox"/> | Mortgage Loans | <input type="checkbox"/> | ATM Deposit |
| <input type="checkbox"/> | Home Equity Loans | <input type="checkbox"/> | Mobile Payments (SpotPay) |
| <input type="checkbox"/> | Commercial Loans | <input type="checkbox"/> | Other _____ |

PURPOSE OF ACCOUNT
