



Savings Account Checklist

Use the following checklist to gather information we'll need from you to open a savings account. We'll need information about yourself and any co-applicants.

To open one of our savings accounts:

1) You must be at least 18 years of age and meet any account-specific age requirements:

- If applying for the Little Savers account as the primary applicant, you must be 18 years of age or older.

2) You must be a U.S. Citizen.

All applicants need to provide the following information:

- ☐ Name, address, phone number, social security number, date of birth and mother's maiden name for each applicant.
- ☐ A valid drivers license (or government issued identification) for each applicant.
- ☐ Name(s) of any beneficiaries to be listed on the account.
- ☐ Initial deposit.
- ☐ If applicable, copies of trust papers or power of attorney papers.
- ☐ If a business, please bring legal documentation that shows when the company was formed, the Employer Identification Number (EIN) or tax identification number registered to your business and resolution showing authorized signers for depository accounts.

To apply please bring the above information to one of our branch offices.

Each applicant must be present to open the account.