

# Sole Proprietorship Account Application

Sole Proprietorships are owned and managed by the Member (and spouse, if applicable).

## Company/Owner Information

|  |       |   |  |
|--|-------|---|--|
| Name of Business   |       | Fictitious Business Name / DBA (if any) |  |
| Nature of Business   |       | Year Established                        |  |
| Street Address (no PO Box)   |       |   |  |
| City   | State | ZIP                                     |  |
| Owner's Email Address  |       | Home Phone                              |  |
| Work Phone   |       | Cell Phone                              |  |
| Women Owned <input type="checkbox"/> Minority Owned <input type="checkbox"/> |       |   |  |

## For "Doing Business As (DBA)" Required Documentation:

Fictitious Business Name Statement (if applicable) – Copy must contain the stamp of the County Clerk.

Signatures and Agreements – By signing this application, I/we certify that all information I/we have provided to Patelco Credit Union ("Patelco") is accurate and complete. I/we authorize Patelco to review my/our account and credit history with consumer reporting agencies to determine my/our eligibility for services I/we request. I/we agree that my/our account will be governed by the Patelco Member Handbook and Fee Schedule as amended from time to time, and I/we agree to be bound by these terms. I/we understand that these documents will be delivered to me/us.

USA Patriot Act Notice – To help the government fight the funding of terrorism and money laundering activities, federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account. What this means for you: When you open an account, we will ask for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver’s license or other identifying documents.

|                        |      |
|------------------------|------|
| Member Signature       | Date |
| Joint Member Signature | Date |

**FOR USE BY PATELCO CREDIT UNION ONLY**

|            |        |
|------------|--------|
| Date       |        |
| Member No. | Suffix |

|                          |                     |
|--------------------------|---------------------|
| <b>Branch</b>            | <b>NAICS Number</b> |
| Application Reviewed by: | Date                |
| Leadership Approval      | Date                |

**Reminder:** The Sole Proprietorship account should be owned by the Member and reports under the Member’s Social Security number.

Insured by NCUA