



**Banking the
Way it Was Meant to Be**

Fidelity Bank At Work

LET'S GET STARTED

Full Legal Name: _____ Date of Birth: _____

SSN# or ITIN (circle one): _____ Mothers Maiden Name: _____

ID Type: _____ ID Number: _____

ID Issue Date: _____ ID Expiration Date: _____

Physical Address: _____

Mailing Address: _____

Email Address: _____

Home Phone: _____ Cell Phone: _____

Occupation: _____ Work Phone: _____

Please select one: ☐ US Citizen ☐ Resident Alien ☐ Non-Resident Alien; If you are a Resident Alien or Non-Resident Alien, please provide your country of citizenship: _____

Are you employed by or associated with a foreign government? ☐ Yes ☐ No

Are you a professional intermediary (i.e.: lawyer, accountant, investment broker, etc.)? ☐ Yes ☐ No

May Visa® notify merchants when your card number or expiration date changes to reduce the risk of you missing a recurring payment? ☐ Yes ☐ No

Would you like to opt-in to allow Fidelity Bank to process your ATM and debit card payments even if you don't have enough money in your account to cover the transaction?¹ ☐ Yes ☐ No

¹Overdraft fee may apply.

NOW, SELECT YOUR ACCOUNTS

Which checking account would you like?

- ☐ At Work
- ☐ At Work Plus

Which savings account would you like?

- ☐ Regular Savings
- ☐ Money Market Savings
- ☐ Money Market Investment
- ☐ CD
- ☐ IRA

Do you plan to buy or refinance a home in the next six months?¹ ☐ Yes ☐ No ☐ Not Sure

Are you interested in a home equity line of credit?^{1,2} ☐ Yes ☐ No ☐ Not Sure

Do you want a complimentary first order of basic checks?³ ☐ Yes ☐ No

Do you want a free 3" x 5" safe deposit box for one year? ☐ Yes ☐ No

Who manages your investments?⁴

I understand that by completing and signing this form I am agreeing to open the selected accounts with Fidelity Bank.

Full Name_____

Signature _____ Date_____



At Work ID (Bank Use Only) _____

Offers available to qualified and active employees of companies enrolled in and in good standing in the Fidelity Bank At Work program. Program and offers are subject to change at any time. Enrollment in the program is not guaranteed, eligibility required. See Banker for details. ¹Loans subject to credit approval ²Bank will pay closing costs up to \$750 based on program guidelines. ³Single Safety Paper Check Stock Only. ⁴Securities and advisory services offered through LPL Financial, a registered investment advisor. Member FINRA/SIPC. Investments are not a deposit, not FDIC insured, and may lose value. NMLS# 402136.
Member FDIC. Equal Housing Lender.