Fidelity Bank At Work

This checklist is intended to serve as a guide that will assist you with introducing the Employer/Employee to the Fidelity Bank At Work program. To ensure that you do not miss any of the important documents/materials, please utilize this checklist to provide your new customers with the best experience.

Initial Onsite Meeting and Business Enrollment Steps	Completed
Banker meets with the business owner to introduce the program. Business contact person completes the **Fidelity Bank At Work – Employer Enrollment Form**	☐
Banker provides the business with copies of the **Fidelity Bank At Work - Employee Flyer** and the **Fidelity Bank At Work** - **Employee Setup Form** (with the Business At Work ID code prepopulated)	☐
Banker and Business Contact agree on a date and time to meet with the business' employees	☐
Provide the Personal Banking Brochures along with Banker's Business Cards	☐
Banker sends the completed **Fidelity Bank At Work – Employer Enrollment Form** to Deposit Operations (DepOps-DDA) for imaging. Once Deposit Operations receives the form, the business will be added to the Fidelity Bank At Work Portal (View List of Enrolled Business) on BankSource.	☐
Banker presents Fidelity Bank At Work to the business' employees at the scheduled appointment. Banker provides copies of the **Fidelity Bank At Work - Employee Flyer** and the **Fidelity Bank At Work - Employee Setup Form** (with the At Work ID code prepopulated).	☐

Employee Enrollment Steps and Welcome Packet	Completed
Employee completes the **Fidelity Bank At Work – Employee Setup Form** and returns completed form to Banker.	☐
Banker uses completed **Fidelity Bank At Work – Employee Setup Form** to proceed with customer setup/account opening. Only one At Work account per employee. Savings products to not apply.	☐
Banker sends the completed **Fidelity Bank At Work – Employee Setup Form** to Deposit Operations (DepOps-DDA) for imaging.	☐
Using a Fidelity Bank Folder (Banker's Business Card tucked in folder): • At Work – Welcome Letter • Account Agreements(s) • Digital Banking Startup Guide Disclosures • All About Your Deposit Account • Disclosure & Fee Schedule • Activation Guide (At Work Plus) • Benefits Reference Guide (At Work and At Work Plus) • Interest Rate Sheet (At Work Plus)	☐