



New Accounts Document Checklist

To help make the new accounts process run as efficiently as possible, please have the following documents available:

Current Government-Issued ID

Driver's license, U.S. passport, or other state-issued ID

Social Security Number

Your card is not typically necessary to be present, unless a minor (usually ages 18 and under)

Source of Funds

This would need to be cash, check, debit card, credit card, or a wire for in-person. A debit card, credit card or current account and routing number if you are opening your account online.

Please be aware that it is very important we receive all necessary documents in order to ensure that we can process your account(s) as smoothly and quickly as possible and avoid any unnecessary delays. Feel free to contact us with any questions you may have.

Thank you!