NEW PERSONAL ACCOUNT CHECKLIST

Bank First offers a wide array of personal checking and savings accounts available to fit your needs. Our bankers are ready to assist you in opening your new account and providing additional information about our full lineup of convenient services.

In order to help process your application quickly, please provide copies of the items listed below and/or have the information available when you open your account online. For complex accounts, our team is ready to assist you at your local Bank First branch.

Personal Checking or Savings Account:

- ☐ Tax Identification Number (SSN, TIN) for all signers/owners.
- ☐ Valid Unexpired Government Issued Identification for all signers/owners.
- ☐ Proof of Physical Address (if different than listed on ID).
- ☐ Birth date, email address, and phone number for all signers/owners.

Minor Checking or Savings Account:

- ☐ If Checking Account: minor must be at least 14 years of age to open. Customers under the age of 18 are required to have a Parent/Legal Guardian as joint owner on the account.
- ☐ If Savings Account: account may be opened as WUTMA account (Wisconsin's Uniform Transfers to Minors Act). Required if minor is not of sufficient signing age.
- ☐ Tax Identification Number (SSN, TIN) for all signers.
- ☐ Valid Unexpired Government Issued Identification for Parent/Legal Guardian.
- ☐ Proof of Physical Address (if different than listed on ID).
- ☐ Birth date and phone number for all signers.

If Applicable:

- ☐ Power of Attorney
    - Tax Identification Number (SSN, TIN).
    - Valid Unexpired Government Issued Identification for all signers.
    - Proof of Physical Address (if different than listed on ID).
    - Power of Attorney documents including signed acknowledgment by Attorney in Fact (Agent).

Additional information may be requested upon review.