

# Streamlined application

Current clients may use this simplified application to apply for any of our business banking deposit accounts as long as the authorized signer(s) and account title will be the same as your existing account(s). Complete this application online or by hand using blue or black ink. To apply for other accounts, visit us online at [everbank.com](http://everbank.com).

EverBank, N.A. is an FDIC insured national bank. For FDIC insurance purposes, your deposits with EverBank are combined by FDIC ownership category with any other deposits you may have with EverBank through other means, such as by your participation in deposit placement services or sweep agreements with another financial institution.

## Notes for Non Residents of the United States:

Due to rules applicable to individuals located outside of the United States, EverBank does not offer its products and services to businesses if the business has any beneficial owners located in the following countries: Austria, Belgium, Bulgaria, Croatia, Republic of Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden and the United Kingdom.

As a result, if the business meets this circumstance, please do not proceed with this application, as EverBank will be unable to process your request.

For security purposes and to help the government fight 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. For this reason, we will ask you for your name, address, date of birth, Social Security number or other Tax Identification Number, and other information that will allow us to identify you. We may also ask other questions or request other documents meant to verify your identity.

## 1. Tell us about the existing account

\_\_\_\_\_  
Name of business or organization **(Account title)**

\_\_\_\_\_  
Doing Business As (DBA) name **(If applicable)**

\_\_\_\_\_  
Name of authorized signer completing this application

\_\_\_\_\_  
Authorized signer security code **(Required)**

\_\_\_\_\_  
Existing account number

\_\_\_\_\_  
Work phone\*

\_\_\_\_\_  
Mobile phone\*

\_\_\_\_\_  
Email

### Referral information

Provide the referring person, publication, website, or offer referral code **(If provided)**.

\_\_\_\_\_  
Referral

Existing account type: **(Select only one of the following account types)**

- Corporation**
- Limited Liability Company**
- Partnership**
- Sole Proprietorship**
- Non-Profit Organization**
- Business other (Specify organization type)** \_\_\_\_\_

\* By providing your phone number, you expressly consent and agree that EverBank, its affiliates, agents, subsidiaries, service providers or any other company acting on its behalf may contact you at that number for any reason about your accounts, now or in the future, by any method, including with an automatic telephone dialing system, prerecorded message, or text message, and including at a number for a cellular phone or other wireless device, regardless of whether you incur charges as a result. To learn more about our privacy practices, please go to [everbank.com/legal/privacy](http://everbank.com/legal/privacy).

## 2. Choose account(s)

Select account(s) and provide deposit amount(s) for each.

Checking (\$1,500 minimum per account)	Deposit amount (Required)
Business Checking	
Business Analysis Checking	
Business Interest Checking	
Small Business Checking (Only available to Sole Proprietors and Single Member LLCs)	
Non-Profit Checking	
<b>Total Checking deposit</b>	
<b>Additional features</b>	
Would you like either of the following: <b>Visa® Debit card*</b> <b>Complimentary checks</b>	
* Not all business/organization types are eligible for debit cards, including, but not limited to, certain condominium owners' associations.	

Money Market	Deposit amount (Required)
Business Money Market (\$1,500 minimum per account)	
Would you like complimentary checks? <input type="radio"/> Yes <input type="radio"/> No	

### Certificate of Deposit

Select CD account(s), term(s) and provide deposit amount(s).

#### Business Certificate of Deposit

Term	Deposit amount (\$1,500 minimum per CD)	Term	Deposit amount (\$1,500 minimum per CD)
3 mo	_____	9 mo	_____
Additional account	_____	Additional account	_____
Additional account	_____	Additional account	_____
<b>Total 3 mo deposit</b>		<b>Total 9 mo deposit</b>	
6 mo	_____	1 yr	_____
Additional account	_____	Additional account	_____
Additional account	_____	Additional account	_____
<b>Total 6 mo deposit</b>		<b>Total 1 yr deposit</b>	
<b>Total Business CD deposit</b>			

#### Business CDARS® CD<sup>1</sup>

**Note:** This requires the **CDARS Deposit Placement Agreement**  
Specify your term and deposit amount. (\$10,000 minimum per CD)

Term	Deposit amount (\$10,000 minimum per CD)
<input type="radio"/> 3 mo <input type="radio"/> 6 mo <input type="radio"/> 1 yr <input type="radio"/> 2 yr <input type="radio"/> 3 yr	

## 3. Submit

- Mail documents to **EverBank Business Banking, PO Box 44060, Jacksonville, FL 32231** or
- Call us at **1.855.563.3177** so we can set up secure delivery of your application via encrypted email. We're available weekdays from 8 a.m.–5 p.m. (ET).

1. Funding limits apply. Please see our website for current funding limits applicable to each CD. Funds for a Business a CDARS® CD account ("Business CDARS CD") may be submitted for placement only after a depositor enters into a CDARS Deposit Placement Agreement with us. This agreement contains important information and conditions regarding the placement of funds by us. Business CDARS CDs are placed each week on Thursday or the next business day thereafter. Early withdrawal penalties apply. IntraFi and CDARS are registered service marks of IntraFi Network LLC.

**For bank use only:** \_\_\_\_\_  
Date                      FC number                      Associate name (Print first & last name)