

# 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.

While EverBank is committed to assisting limited English proficiency (LEP) clients and potential clients, account applications and agreements, disclosures, statements, notices, and other documents for our products and services, as well as all account opening, online banking, mobile applications, and other electronic systems provided by EverBank will be provided in English. As a result, it will be necessary for clients and potential clients to speak, read and understand English or to have an appropriate translator assisting them. EverBank offers the following resources for LEP consumers: (1) Bilingual associates in certain financial centers and through our call centers. (2) Access to interpretive services through our call centers. (3) Limited ATMs with language-preference options.

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** **(Private, for profit)**

☐ **Limited Liability Company** **(Not a disregarded entity)**

☐ **Partnership** **(GP, LP, LLP, LLLP)**

☐ **Unincorporated association**

☐ **Disregarded entity** **(Single-member LLC)**

☐ **Nonprofit organization**

☐ **Sole proprietorship**

☐ **Business other** **(Specify organization type)** \_\_\_\_\_

## 2. Choose product type(s) and account(s)

Select the product type(s) and account(s) you want to open. For each selection, enter the deposit amount. If you'd like to open more than one account for the same product type, please specify below.

Checking products	Number of account(s)	Total deposit amount (\$0 minimum)
EverBank Business Checking		
EverBank Analysis Checking		
Business Interest Checking		
<b>Note:</b> Available only to existing Business Interest Checking account holders		
<b>Total Checking product(s) 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.		

\* 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).

Money Market product	Number of account(s)	Total deposit amount (\$1,500 minimum per account)
<b>Business Money Market</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.		

**Certificate of Deposit products**

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

**Business Certificate of Deposit**

Term	Deposit amount (\$1,500 minimum per CD)
<input type="radio"/> 3 mo <input type="radio"/> 6 mo <input type="radio"/> 9 mo <input type="radio"/> 1 yr <input type="radio"/> 1.5 yr <input type="radio"/> 2 yr <input type="radio"/> 2.5 yr <input type="radio"/> 3 yr <input type="radio"/> 4 yr <input type="radio"/> 5 yr	
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<input type="radio"/> 3 mo <input type="radio"/> 6 mo <input type="radio"/> 9 mo <input type="radio"/> 1 yr <input type="radio"/> 1.5 yr <input type="radio"/> 2 yr <input type="radio"/> 2.5 yr <input type="radio"/> 3 yr <input type="radio"/> 4 yr <input type="radio"/> 5 yr	
<b>Total Business CD deposit</b>	

**Business CDARS® CD<sup>1</sup>**

**Note:** This requires the **CDARS Deposit Placement Agreement**

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	
<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	
<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	
<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	
<b>Total Business CDARS® CD deposit</b>	

**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).

\* 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).

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)