

Add account holder



Use this form to add an account holder to your account. Enter your information clearly using blue or black ink.

1. Your information

Name of existing account holder or attorney in fact		Security code (If left blank, your request could be delayed)	
Account number(s)			
Residential address (No PO boxes)	City	State	ZIP
Is your residential address also your mailing address? <input type="radio"/> Yes <input type="radio"/> No (If no, provide your mailing address below.)			
Mailing Address (if different from above)	City	State	ZIP
Home phone	Email		

2. Add account holder[s]

Please list all account holders you wish to add below. Additional information for each account holder you wish to add will be gathered in section 3. As part of the process of adding a new account holder, we will conduct a review of that individual including obtaining his or her consumer report.

Notes for Non Residents of the United States:

At this time, EverBank does not offer its products and services to individuals located outside of the United States. As a result, if you are not located within the United States, please do not proceed with this application or provide us with any of your personal information, as EverBank will be unable to process your request.

a.	First name	M.I.	Last name
b.	First name	M.I.	Last name
c.	First name	M.I.	Last name
d.	First name	M.I.	Last name

3. Additional account holder information

Provide the following information for the additional account holder being added. If you are adding more than one account holder, please proceed to the next page.

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 or is added to an account. For this reason, we will ask you for your name, address, date of birth, Social Security Number or other Taxpayer 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.

Personal information

_____	_____	_____	_____	_____
Title	First name	M.I.	Last name	Suffix
_____		_____		
Social Security number/ITIN		Date of birth		
_____	_____	_____		
Home phone*	Mobile phone*	Email		

* 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.

Address information

_____	_____	_____	_____
Residential address (No PO boxes)	City	State	ZIP
Is your residential address also your mailing address? <input type="radio"/> Yes <input type="radio"/> No (If no, provide your mailing address below.)			
_____	_____	_____	_____
Mailing address (If different from above)	City	State	ZIP

Security Information

Your security code is a PIN, phrase or combination of letters and numbers that provides an added layer of security we use to help verify your identity. You'll be asked to provide your code when contacting us with questions about your account.

Create your security code (Must be 6-20 letters and/or numbers, no special characters. Do not use your Social Security number, date of birth or mother's maiden name)

Security code hint (Enter a keyword or phrase that may be used to help you recall your code)

Citizenship information

I am a: ☐ U.S. citizen
☐ U.S. resident alien (Please provide your country) _____
☐ Non-resident alien (Please provide your country) _____

Are you authorized to work in the United States? ☐ Yes ☐ No

Employment information

Status: ☐ Employed ☐ Self-employed ☐ Retired ☐ Student/minor ☐ Not employed

_____	_____	_____
Employer name	Position or title	Length of employment

Additional features

Would you like to order either of the following for the account holder being added?

Order checks. New checks will be the same style as your previous order but with the names of all account holders; fees do apply.

Order Visa® Debit card. Debit card and PIN will be sent separately in 7-10 days.

Additional account holder

Please provide the following information for each additional account holder you wish to add. Copy this page as needed and return all pages when submitting this form.

Personal information

_____	_____	_____	_____	_____
Title	First name	M.I.	Last name	Suffix
_____			_____	
Social Security number/ITIN			Date of birth	
_____		_____		_____
Home phone*		Mobile phone*		Email

* 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.

Address information

_____	_____	_____	_____
Residential address (No PO boxes)	City	State	ZIP
Is your residential address also your mailing address? <input type="radio"/> Yes <input type="radio"/> No (If no, provide your mailing address below.)			
_____	_____	_____	_____
Mailing address (If different from above)	City	State	ZIP

Security Information

Your security code is a PIN, phrase or combination of letters and numbers that provides an added layer of security we use to help verify your identity. You'll be asked to provide your code when contacting us with questions about your account.

Create your security code (**Must be 6-20 letters and/or numbers, no special characters. Do not use your Social Security number, date of birth or mother's maiden name**) _____

Security code hint (**Enter a keyword or phrase that may be used to help you recall your code**) _____

Citizenship information

I am a: ☐ **U.S. citizen**
☐ **U.S. resident alien** (**Please provide your country**) _____
☐ **Non-resident alien** (**Please provide your country**) _____

Are you authorized to work in the United States? ☐ **Yes** ☐ **No**

Employment information

Status: ☐ **Employed** ☐ **Self-employed** ☐ **Retired** ☐ **Student/minor** ☐ **Not employed**

_____	_____	_____
Employer name	Position or title	Length of employment

Additional features

Would you like to order either of the following for the account holder being added?

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Order Visa® Debit card. Debit card and PIN will be sent separately in 7-10 days.

4. Agreements and certifications


By signing section 5, and by maintaining an EverBank account(s), I understand and agree that EverBank, National Association ("EverBank") will rely on the veracity and completeness of the information on this form in making the requested account change(s). I hereby certify that the information provided on this form and any accompanying documentation is true, complete, and accurate and that I will promptly notify EverBank of any material change in such information or statements. I agree/understand and certify to EverBank that:

- I have read and agree to be bound by the terms and conditions of the account as set forth in the Personal Account Terms, Disclosures and Agreements Booklet, the Deposit Account Fee Schedule, and any other disclosures or addenda related to the accounts or services I have requested on this form, and to which I give my consent to EverBank providing, each of which may be amended from time to time.
- I authorize you to make any credit, employment, or other investigative inquiries you deem appropriate (including, without limitation, obtaining a consumer report) in connection with your determination to open, renew, update, maintain, or collect on my account. I understand that upon my request, EverBank will provide information on whether a consumer report was obtained and the names and addresses of any consumer-reporting agencies that provided such report(s).
- I understand that you may report information about my account to credit bureaus. Late payments, missed payments, or other default on my account may be reflected in my credit report. In addition, I understand that I am being notified, as required by law, that a negative credit report reflecting on my credit record may be submitted to a credit reporting agency if I fail to fulfill the terms of any credit obligations I may have to EverBank.
- I understand that all information I supply when applying for an account or requesting new or additional products or services becomes property of EverBank and will not be returned, except as required by law.

The undersigned agrees that we, EverBank, in our sole discretion, may accept documents that you have signed and sent to us by electronic means, like fax, email, or other file transmittal processes we might offer. By sending us any such document by electronic means, the undersigned agrees that we may rely on it and on the signature, and that the document is binding on the signer even if the original signed document is not delivered to us.

5. Signature(s)

Note: The existing account holder making this request and all new account holders being added must sign below. By signing below, the existing account holder expressly requests and consents to adding the account holders identified above, and each new account holder being added expressly agrees to the terms and conditions described above.

	_____	_____	_____
	Signature	Existing account holder or agent as attorney in fact for existing account holder	Date
	_____	_____	_____
	Signature	New account holder	Date
	_____	_____	_____
	Signature	New account holder	Date
	_____	_____	_____
	Signature	New account holder	Date
	_____	_____	_____
	Signature	New account holder	Date

6. Submit

Upload this form and any additional documentation so that we can move forward in the quickest and most secure way. Simply log in to your account at everbank.com and:

- Select the **Actions** tab
- In the TIAA Documents section, select **Upload documents**
- Select **Files** you would like to upload
- Select **Folder** to upload files to and follow directions

For bank use only: _____

Verify client	Date verified	FC number	Associate name (Print first & last name)
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