

New account application

To apply for any of our Business or Non-Profit Checking accounts, Certificate of Deposit, CDARS® or Money Market Accounts, complete this application online or by hand using blue or black ink. To apply for other accounts, visit us online at 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.

1. How did you hear about us?

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

2. Choose business type

Select only one of the following account types:

- ☐ Corporation ☐ Limited Liability Company
☐ Partnership ☐ Sole Proprietorship
☐ Non-Profit Organization ☐ Business other (Specify organization type) _____

3. Tell us about the business or non-profit organization

To meet government requirements for opening an account, please tell us:

Is the business organized/registered in the U.S.?

- ☐ Yes (If yes, provide the state or territory where the business is registered) _____
☐ No (If no, we cannot open the account)

Name of business or organization (Account title)

Doing Business As (DBA) name (If applicable)

All fields below must be completed. Note: Business street address must be the physical operating location of the business, must be in the U.S. or territories only and cannot be a PO box.

Business street address (No PO boxes)	City	State	Country	ZIP
Business mailing address (If different from above)	City	State	Country	ZIP
U.S. Tax Identification Number	Business phone			
Business web address	Business email			
Year established	Number of employees			

Provide a brief description of the business and any specialties that apply

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.

4. Authorized signer(s)

Authorized signer*

Personal information

Business title: ☐ President ☐ Vice President ☐ Partner ☐ Treasurer ☐ Member ☐ Other: _____

_____	_____	_____	_____	_____
Title	First name	M.I.	Last name	Suffix
_____	_____	_____	_____	_____
Date of birth	Work phone**	Mobile phone**	Email	

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. All authorized signers on the account are required to have their own security code and security code reminder.

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.

_____	_____
Create your security code	Security code hint (Enter a keyword or phrase that may be used to help you recall your code)
Are you a U.S. citizen? ☐ Yes ☐ No (If no, provide country of citizenship) _____	

Authorized signer*

Personal information

Business title: ☐ President ☐ Vice President ☐ Partner ☐ Treasurer ☐ Member ☐ Other: _____

_____	_____	_____	_____	_____
Title	First name	M.I.	Last name	Suffix
_____	_____	_____	_____	_____
Date of birth	Work phone**	Mobile phone**	Email	

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Are you a U.S. citizen? ☐ Yes ☐ No (If no, provide country of citizenship) _____	

Authorized signer*

Personal information

Business title: ☐ President ☐ Vice President ☐ Partner ☐ Treasurer ☐ Member ☐ Other: _____

_____	_____	_____	_____	_____
Title	First name	M.I.	Last name	Suffix
_____	_____	_____	_____	_____
Date of birth	Work phone**	Mobile phone**	Email	

* Only Authorized Signer(s) can conduct account transactions or make changes.

** 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.

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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.

Create your security code

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

Are you a U.S. citizen? ☐ Yes ☐ No [\(If no, provide country of citizenship\)](#)

Authorized signer*

If you have additional Authorized signers, complete the **Additional Authorized Signer form**  as needed and return with the application.

Personal Information

Business title: ☐ President ☐ Vice President ☐ Partner ☐ Treasurer ☐ Member ☐ Other: _____

Title _____ First name _____ M.I. _____ Last name _____ Suffix _____

Date of birth _____ Work phone** _____ Mobile phone** _____ Email _____

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. All authorized signers on the account are required to have their own security code and security code reminder.

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.

Create your security code

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

Are you a U.S. citizen? ☐ Yes ☐ No [\(If no, provide country of citizenship\)](#)

5. 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	
Total Checking deposit	

Additional features

Would you like either of the following: ☐ Visa® Debit card* ☐ Complimentary checks

* Not all business/organization types are eligible for debit cards, including, but not limited to, certain condominium owners' associations.

* Only Authorized Signer(s) can conduct account transactions or make changes.

** 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.

Money Market

Deposit amount (Required)

☐ **Business Money Market** (\$1,500 minimum per account)

Would you like complimentary checks? ☐ Yes ☐ No

Certificate of Deposit

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

☐ **Business Certificate of Deposit**

Term	Deposit amount (\$1,000 minimum per CD)	Term	Deposit amount (\$1,000 minimum per CD)
☐ 3 mo		☐ 9 mo	
Additional account		Additional account	
Additional account		Additional account	
Total 3 mo deposit		Total 9 mo deposit	
☐ 6 mo		☐ 1 yr	
Additional account		Additional account	
Additional account		Additional account	
Total 6 mo deposit		Total 1 yr deposit	
Total Business CD deposit			

☐ **Business CDARS® CD¹**

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)
☐ 3 mo ☐ 6 mo ☐ 1 yr ☐ 2 yr ☐ 3 yr	

6. 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)