Add Power of Attorney

EverBank

Use this form to add a Power of Attorney to an account. Enter your information clearly using blue or black ink.

Do not use this form for Trust accounts. For Trust accounts, please call 1.888.882.3837.

For Non Residents of the United States:
EverBank's products and services are designed, offered, and intended for use only by persons physically residing in the United States. As a result, if you are not physically located within the United States or you are not able to provide U.S. residential and mailing addresses, please do not proceed with this form or provide us with any of your personal information, as EverBank will be unable to process your request. **Non-U.S. residents can only be added to an account in person at an EverBank Financial Center.**

1. Account holder information

Name of account holder

Security code **(Not applicable if completed by attorney in fact)**

Account number(s)

Address | City | State | ZIP

Home phone | Email

2. Add attorney in fact (Power of Attorney)

Note: This section should be completed by the agent being added. As part of the process of adding a new agent, we will conduct a review of that individual including requesting his or her consumer report. The new agent, must sign this form.
(If adding more than one agent, copy pages 1-2 as needed and return all pages when submitting this form.)

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/privacy.

Address information

Residential address **(No PO boxes)** | City | State | Country | ZIP

Is your residential address also your mailing address? ◯ **Yes** ◯ **No** **(If no, provide your mailing address below.)**

Mailing address **(If different from above)** | City | State | Country | ZIP

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

3. Order new checks

Checks will only be issued in the name of the principal account holder(s).

☐ **Order checks.** New checks will be the same style as your previous order; fees do apply.

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 all the information provided to EverBank through written, verbal, electronic, or other methods. I hereby certify, to the best of my knowledge, that all of the information provided to EverBank is true, complete, and accurate and that I will promptly notify EverBank of any material change in such information or statements. I further understand, agree 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, and any other disclosures or addenda related to the accounts or services I have requested, each of which may be amended from time to time.
- I expressly consent to EverBank opening the account(s) and/or providing the service(s) requested on this form.
- I authorize EverBank to make any credit, employment, or other investigative inquiries it deems 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 reports.
- 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 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)

By signing below the undersigned acknowledges and agrees to these terms and conditions.

Account holder or agent as attorney in fact for account holder _____ Date _____

Attorney in fact _____ Date _____

☐ **Check here if the principal is incapacitated.**

6. Signature and notary information

Attorney in fact signature _____ Date _____

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of _____

County of _____

Subscribed and sworn to (or affirmed) before me by means of ◯ **physical presence** or ◯ **online notarization**,

this _____ day of _____, 20 _____, by _____, proved to me on

the basis of satisfactory evidence to be the person(s) who appeared before me.

If physical presence: ◯ **Personally known** or ◯ **produced ID** **(Provide driver's license/ID #):** _____

_____ (SEAL)

Notary Public signature

Notary name **(Print first and last name)** _____

Notary state _____ Commission expiration date _____

Commission number _____

7. 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:

- Navigate to the Document Center
- Select the Document Upload tab
- Select the files you would like to upload
- Review and accept the Terms and Conditions before uploading documents

For bank use only: Verify client _____ Date verified _____ FC number _____ Associate name **(Print first & last name)** _____