



1187 Troy Schenectady Road
 Latham, NY 12110
 518-382-0605
 866-SUNMARK

BUSINESS MEMBERSHIP APPLICATION
Sole Proprietorships

New Account Account Change: _____

BUSINESS ACCOUNT TYPE		MEMBER NUMBER:	
<input type="checkbox"/> Business Savings <input type="checkbox"/> Basic Business Checking <input type="checkbox"/> Business Earnings Checking <input type="checkbox"/> Business Share Certificate <input type="checkbox"/> Business Money Market			
ACCOUNT SERVICES			
Free Services: <input type="checkbox"/> Debit Card <input type="checkbox"/> eStatements			
Other Services: <input type="checkbox"/> Overdraft Privilege <input type="checkbox"/> Transfer Target Source <input type="checkbox"/> Safe Deposit Box			
BUSINESS PRODUCTS/SERVICES			
I am interested in the product(s)/service(s) below and would like to be contacted by a Business Officer.			
<input type="checkbox"/> Business Credit Card <input type="checkbox"/> Business Vehicle Loan <input type="checkbox"/> Business Term Loan/Line of Credit <input type="checkbox"/> Business Real Estate Loan <input type="checkbox"/> Merchant Services <input type="checkbox"/> Payroll Processing Services			
BUSINESS ACCOUNT INFORMATION			
Business/DBA Name		Business Phone No.	Tax ID No. (EIN/SSN)
Physical Address of Business (Street, City, State and Zip)			
Mailing Address of Business (if different)			
Year Business Established	Number of Employees	Nature of Business	
Business Email Address		Business Web Address	
SOLE PROPRIETORSHIP – Additional documentation may be required.			
Required Documentation			
<input type="checkbox"/> Valid Identification (owner/all signers)			
<input type="checkbox"/> Assumed Name Certificate			
<input type="checkbox"/> Federal Tax ID Number Letter (if applicable)			
BUSINESS OWNER INFORMATION – If additional signer(s), please complete the Authorized Signer Information boxes below.			
Primary Owner's Full Name		Title	Date of Birth SSN
Driver's License Number		State Issued	Expiration Date
Home Address (Street, City, State and Zip) No PO Boxes		Email	
Cell Phone	Home Phone	Office Phone	U.S. Citizen? <input type="checkbox"/> Yes <input type="checkbox"/> No
NOTE: If you earn income from another employer besides the Business shown above, please provide the following information:			
Employer's Name		Type of Business	Job Title No. of Years
ADDITIONAL AUTHORIZED SIGNER(S)			
In addition to the Business Owner, the following named person(s) is/are authorized, on behalf of the Business, to execute any document required by the credit union to transact business, including to sign or endorse any order for the payment or withdrawal of funds from this account, make deposits to this account, and/or transact any other business related to this account. A Business Owner is the only individual entitled to open/close accounts or to add/delete Authorized Signers.			
AUTHORIZED SIGNER INFORMATION #1			
Name		Title	
Driver's License Number	State Issued	Expiration Date	Date of Birth SSN
Home Address (Street, City, State and Zip) No PO Boxes		Email	
Cell Phone	Home Phone	Business Phone	
AUTHORIZED SIGNER INFORMATION #2			
Name		Title	
Driver's License Number	State Issued	Expiration Date	Date of Birth SSN
Home Address (Street, City, State and Zip) No PO Boxes		Email	
Cell Phone	Home Phone	Business Phone	

AUTHORIZED SIGNER INFORMATION #3

Name		Title		
Driver's License Number	State Issued	Expiration Date	Date of Birth	SSN
Home Address (Street, City, State and Zip) No PO Boxes			Email	
Cell Phone	Home Phone		Business Phone	

IMPORTANT IRS INFORMATION – TIN CERTIFICATION

Under penalties of perjury, I certify that: 1.) The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and 2.) Unless designated below, I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and 3.) Unless designated below, I am a U.S. citizen or other U.S. person; and 4.) The FATCA code(s) entered below (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. If you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return then you must check the box "I am subject to backup withholding" below. Complete a W-8 BEN if you are not a U.S. person. If a W-8 BEN is completed, your signature does not serve to certify this section.

I am subject to backup withholding I am exempt I am a foreign person other than a U.S. resident alien (complete IRS form W-8BEN)

Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____

SIGNATURES

You hereby apply for membership with Sunmark Credit Union. By signing below, you warrant the truth of the information contained in your application for business membership and/or in subsequent representations to us. You realize that such information will be relied upon by us in determining your membership eligibility and/or credit worthiness. You hereby authorize us, our employees and agents to investigate and verify any information provided to us by you. You agree to be bound by the terms and conditions found within this Business Membership Application and to the bylaws, rules and regulations of the Credit Union. You further agree to be bound by the terms and conditions found within the Master Business Account Agreement and Disclosures and the Rate and Fee Schedules which are incorporated into and made part of this application and you agree to the terms and conditions set forth therein and to any amendments we make from time to time. You authorize any person, association, firm, corporation or personnel office to furnish information concerning your affairs upon our request, including, but not limited to, providing credit and employment history information. You also authorize the Credit Union to periodically request and use reports from outside consumer reporting agencies and to answer questions about the Credit Union's experience with you.

In addition to establishing a Business Membership Account, you may also from time to time request additional Accounts and/or Account Services be established on your behalf and/or the addition or deletion of Authorized Signer(s) of your Account(s). Your signature below is your continuing authorization for the Credit Union to follow your written or verbal instructions to do so and you agree that your continuing authorization will remain in effect unless we receive written instructions to the contrary. You hereby authorize us to recognize any of the signatures subscribed herein in the payment of funds or the transaction of any business for your Account(s).

NOTE: The Credit Union reserves the right to deny or restrict certain high-risk deposit business entities. This specifically includes business entities who conduct transactions involving Internet Gambling, Money Services Businesses and/or Marijuana-Related Businesses. You certify that the business for which this account is being established, does not and will not participate in unlawful internet gambling and is not a Money Service Business or Marijuana-Related Business.

Important information about procedures for opening a new account – To help the government fight the funding of 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. What this means for you: When you open an account, we will ask your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver's license and other identifying information.

The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

_____ I certify that I am the sole owner of the Business applying for membership. I further certify that the Business is a sole proprietorship and that there is no one else having any right, title, or interest therein.
Owner

Authorized Signer

Authorized Signer

Authorized Signer

FOR CREDIT UNION USE ONLY

Date: _____ Opened/Approved By: _____ Member Eligibility: _____

Verification: Accurint/PreciseID BizChex Credit Report Existing Member (Account # _____)

Membership: Approved Denied (Adverse Action Yes No)

List Documents Obtained:

Comments: