

ACCOUNT NUMBER: \_\_\_\_\_

DATE: \_\_\_\_\_

**NEW ACCOUNT APPLICATION-IRA**

\* Legal name (as appears on Driver's License) \_\_\_\_\_

\* Preferred name (if different) \_\_\_\_\_

\* Physical Address: \_\_\_\_\_

\* Mailing Address (if different) \_\_\_\_\_

\* Previous Address (if less than 2 years at current address) \_\_\_\_\_

\* Home Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_ Business Phone \_\_\_\_\_

\* U.S. Person-SS# \_\_\_\_\_ \*Date of Birth \_\_\_\_\_ Email \_\_\_\_\_

DL \_\_\_\_\_ Issued \_\_\_\_\_ Expires \_\_\_\_\_

(ST) (Number)

FRSB Password \_\_\_\_\_ (This password will be used to verify your identity when you call in.)

Current Employer: \_\_\_\_\_ Phone \_\_\_\_\_

Occupation (if retired still need past occupation) \_\_\_\_\_

<b>*Please Indicate Status:</b>	<b>U.S. Citizen</b>	<b>Resident Alien</b>	<b>Non-Resident Alien (W8BEN)</b>
<b>Please provide one or more of the following:</b>			
Tax payer ID # _____		Passport # / Country of Issuance _____	
(Must be government issued, evidence nationality or residence and bear current photograph or similar safeguard)			

Transfer

Roll Over

New Money

**\* Beneficiary Information: PRIMARY / CONTINGENT**

Primary Share	Contingent Share	Name of Beneficiary	SSN or TIN	Relationship to IRA Owner	Date of Birth	Address, City, State, and Zip
%	%					
%	%					
%	%					
%	%					
%	%					
%	%					

By signing this document, I authorize First Robinson Savings Bank, N.A. to verify all information provided, and , to obtain additional information regarding my personal financial history from a consumer-reporting agency or agencies and/or other financial institutions. I understand that this information will only be used in conjunction with First Robinson Savings Bank's products and services requested by me and that it will remain in force for the duration of my association.

I certify that the information provided by me is true and correct to the best of my belief.

X \_\_\_\_\_  
Customer Signature
Date

----- **For Internal Bank Use Only** -----

New Account     CIF Info reviewed (no change)     CIF info reviewed (Updated)    Risk Code \_\_\_\_\_ CSR \_\_\_\_\_