



# OPEN AN IRA ROLLOVER ACCOUNT

## Account Application

**INSTRUCTIONS: Print & complete, take a picture and email to [familybanking@bankofwhittier.com](mailto:familybanking@bankofwhittier.com)**

**Personal Information (Account(s) available to individuals with a valid Social Security Number only)**

### APPLICANT

**CO-APPLICANT/JOINT**

**BENEFICIARY POD\* ACCOUNT**

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Birth Date \_\_\_/\_\_\_/\_\_\_  Married  Unmarried  Separated  
 Widow

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 Widow

Citizenship:  U.S.  Permanent Resident Alien  
 Non-Permanent Resident Alien

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 Non-Permanent Resident Alien

Birth Place: \_\_\_\_\_

Birth Place: \_\_\_\_\_

Country of Citizenship: \_\_\_\_\_

Country of Citizenship: \_\_\_\_\_

**Home Address** (do not use P.O. Box, U.S. address only)

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Street \_\_\_\_\_ Apt # \_\_\_\_\_

Street \_\_\_\_\_ Apt # \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone: \_\_\_\_\_

Home Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

### Identification – Two forms required

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#### Primary Identification

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Driver's License or State Issued ID# \_\_\_\_\_

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Issue Date \_\_\_/\_\_\_/\_\_\_ Exp. Date \_\_\_/\_\_\_/\_\_\_ State \_\_\_\_\_  
MM DD YYYY MM DD YYYY

Issue Date \_\_\_/\_\_\_/\_\_\_ Exp. Date \_\_\_/\_\_\_/\_\_\_ State \_\_\_\_\_  
MM DD YYYY MM DD YYYY

\*POD - Payable on Death

**Secondary Identification** (choose one)

Passport # \_\_\_\_\_ Exp. Date \_\_/\_\_/\_\_\_\_  
MM DD YYYY

Country of Issue

Military ID # \_\_\_\_\_ Exp. Date \_\_/\_\_/\_\_\_\_  
MM DD YYYY

Major Bank/Credit Card  American Express  Visa

MasterCard  Discover Card  Diners Club

Account Number \_\_\_\_\_ Exp. Date \_\_\_\_\_  
MM DD YYYY

**For Security Purposes**

Mother's Maiden Name \_\_\_\_\_

**Secondary Identification** (choose one)

Passport # \_\_\_\_\_ Exp. Date \_\_/\_\_/\_\_\_\_  
MM DDYYYYY

Country of Issue

Military ID # \_\_\_\_\_ Exp. Date \_\_/\_\_/\_\_\_\_  
MM DDYYYYY

Major Bank/Credit Card  American Express  Visa

MasterCard  Discover Card  Diners Club

Account Number \_\_\_\_\_ Exp. Date \_\_/\_\_/\_\_\_\_  
MM DD YYYY

**For Security Purposes**

Mother's Maiden Name \_\_\_\_\_

**Employment Information**

**Employment Status**  Employed  Self-Employed

Retired  Student  Homemaker  Not Employed

Occupation: \_\_\_\_\_ Start Date \_\_/\_\_\_\_  
MM YYYY

Employer \_\_\_\_\_

Street \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Main Phone/Directory Number \_\_\_\_\_

**Employment Information**

**Employment Status**  Employed  Self-Employed

Retired  Student  Homemaker  Not Employed

Occupation: \_\_\_\_\_ Start Date \_\_/\_\_\_\_  
MM YYYY

Employer \_\_\_\_\_

Street \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Main Phone/Directory Number : \_\_\_\_\_

**I/We certify that the information submitted in this application is true, complete, and accurate. I/We understand that any misrepresentation will be cause for denial of admission.**

Account Owner \_\_\_\_\_

Date \_\_\_\_\_

Account Co-Owner \_\_\_\_\_

Date \_\_\_\_\_