

Account #:
Card #:
Portfolio #:
Banker Initials:

TRUST/ESTATE ACCOUNT APPLICATION

Trust/Estate	Trust/Estate Legal Name						Type	
	Check if existing customer:							
	Physical Address				City		State	Zip
	Mailing/Alternate Address				City		State	Zip
	Tax ID Number				Email			
	Home Phone				Cell Phone			
	Purpose of Account				How did you hear about Security Bank & Trust Co.?			
Trustee/Executor 1	Legal Name							
	Check if existing customer:							
	Physical Address				City		State	Zip
	Mailing/Alternate Address				City		State	Zip
	Social Security Number		Date of Birth	DL #		DL State	DL Iss	DL Exp
	Home Phone		Cell Phone		Email			
	Current Employer		Occupation		Phone #		City/State	
Trustee/Executor 2	Legal Name							
	Check if existing customer:		Check if physical address same as first applicant:					
	Physical Address				City		State	Zip
	Mailing/Alternate Address				City		State	Zip
	Social Security Number		Date of Birth	DL #		DL State	DL Iss	DL Exp
	Home Phone		Cell Phone		Email			
	Current Employer		Occupation		Phone #		City/State	
Trustee/Executor 3	Legal Name							
	Check if existing customer:		Check if physical address same as first applicant:					
	Physical Address				City		State	Zip
	Mailing/Alternate Address				City		State	Zip
	Social Security Number		Date of Birth	DL #		DL State	DL Iss	DL Exp
	Home Phone		Cell Phone		Email			
	Current Employer		Occupation		Phone #		City/State	

Additional Products/Services							
	Debit Card- Daily Limit: POS \$1,000/ATM \$309-			Signer 1	Signer 2	Signer 3	
	Checks, list desired quantity, and style:						Overdraft Protection
	Online Banking/Mobile Banking						Lending Services
							Credit Card
Anticipated Account Activity							
As a full-service bank, we are committed to providing our customers with financial products and services that meet their complete financial needs. To assist us with determining whether the products and services you have selected are appropriate, please provide the following information.							
Transaction Type	Expected?		If yes, select the total expected amount per month				
Cash Deposits	Yes	No	\$1-\$500	\$501-\$1,000	\$1,001-\$5,000	\$5,001-\$10,000	\$10,001+
Cash Withdrawals	Yes	No	\$1-\$500	\$501-\$1,000	\$1,001-\$5,000	\$5,001-\$10,000	\$10,001+
ACH Credits	Yes	No	\$1-\$500	\$501-\$1,000	\$1,001-\$5,000	\$5,001-\$10,000	\$10,001+
ACH Debits	Yes	No	\$1-\$500	\$501-\$1,000	\$1,001-\$5,000	\$5,001-\$10,000	\$10,001+
Deposit Checks	Yes	No	\$1-\$500	\$501-\$1,000	\$1,001-\$5,000	\$5,001-\$10,000	\$10,001+
Write Checks	Yes	No	\$1-\$500	\$501-\$1,000	\$1,001-\$5,000	\$5,001-\$10,000	\$10,001+
Domestic Wires In	Yes	No	\$1-\$500	\$501-\$1,000	\$1,001-\$5,000	\$5,001-\$10,000	\$10,001+
Domestic Wires Out	Yes	No	\$1-\$500	\$501-\$1,000	\$1,001-\$5,000	\$5,001-\$10,000	\$10,001+
Foreign Wires In	Yes	No	\$1-\$500	\$501-\$1,000	\$1,001-\$5,000	\$5,001-\$10,000	\$10,001+
Foreign Wires Out	Yes	No	\$1-\$500	\$501-\$1,000	\$1,001-\$5,000	\$5,001-\$10,000	\$10,001+
Virtual Currency In	Yes	No	\$1-\$500	\$501-\$1,000	\$1,001-\$5,000	\$5,001-\$10,000	\$10,001+
Virtual Currency Out	Yes	No	\$1-\$500	\$501-\$1,000	\$1,001-\$5,000	\$5,001-\$10,000	\$10,001+
Transaction Account Application Disclosure							
<u>Business Trusts:</u> As the owner or officer of this organization, I have been notified that Security Bank & Trust Co. is required by Federal regulation to implement the Unlawful Internet Gambling Enforcement Act (Regulation GG - UIGEA) to ensure that its commercial customers' accounts do not receive deposits or other credits derived from illegal Internet gambling. <u>All Trusts</u> I certify that the information provided by me is true and correct to the best of my knowledge. An applicant supplying a false material statement that is believed not to be true with respect to information requested on the application is guilty of perjury. By signing this document, I authorize Security Bank & trust Co. to verify all information provided and 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 Security Bank & Trust Co. 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 knowledge. An applicant supplying a false material statement that is believed not to be true with respect to the information requested on the application is guilty of perjury.							
Signature(s)							
Sign						Date	
Sign						Date	
Sign						Date	