



Application Memorandum for Opening Current Account

Date Opened _____

Account Number _____

Name _____
Title: _____
Mailing Address/Residence: _____
Office Location: _____

BUSINESS

Business

Occupation Agri. Mfg Wholesale New Venture _____
Or Profession Position _____ Retail Transport Other _____

Types of Account Personal Sole Owners Partnership Clubs Co.

M S R: Account Opened By: _____
Initial Deposit: Amount: \$ _____

Contact Information

Telephone Numbers
Home: _____
Cell: _____
Work: _____
Email Address: _____

Basic Information

Nationality: _____
Place of Birth: _____
Mailing Address
Street: _____
Town/Village: _____
Country: _____

Employment History

Employment Status: Full Time Part Time Temp

Position Held: _____
Employer's Name: _____
Work Email: _____
Work Phone Number: _____
Employer's Address
Street: _____
Town/Village: _____
How long in present employment _____ years _____ mths
Places worked in last five (5) years _____

Self Employed Information

Name of Business: _____
Address: _____
How long have you been self-employed? __yr(s) __mth
Type of Business: _____

Annual Income (For Business Accounts Only)

Less than EC\$25,000 \$25,001 – \$50,000.00 \$50,001 – \$100,000 Over \$100,000

Initial deposit: _____ (Over E\$C27, 000.00 please complete the source of funds form)

Please indicate the original source of initial funds:

Savings Salary Sale of Property Sale of Business Inheritance Other: _____

Approximately how much you intend to deposit each year:

Less than \$5,000 \$5,001 - \$10,000 \$10,001 – \$50,000 \$50,001 – \$100,000 Over \$100,000

Reference

Name: _____

Name: _____

Address: _____

Address: _____

Reasons for selecting this Credit Union Transfer Re-opening Chance of Connection Other _____

Other (explain): _____

Other Accounts at: _____

Acquaintances at this Credit Union: _____

Handling Instructions**Statement** Hold Mail**Authority Documents** Received To Follow**Signature Cards** Cards Received Cards to Follow**Special Instructions:** _____

Name of Signatory**Signature**

1. _____

2. _____

Member(s) Signature: _____

Date: _____