



## Instructions

1. Complete all information below.
2. Take a clear copy of your identification. Acceptable forms of identification include: State Driver's License, State Identification Card, Military Identification or Passport.
3. Submit your application and identification using one of the following methods:
  - a. Mail your application and copy of your identification to the following address:  
 Meridian Bank  
 Attn: New Accounts  
 16 W Market St  
 West Chester, PA 19382
  - b. Scan and send through our secure mail system. [Click here to access.](#)
4. A Meridian Bank representative will contact you within 2 business days of receiving your request.

## Request Details

| Select Account:                | Relationship:         | Purpose of Account (ex. Household): | Opening Deposit: |
|--------------------------------|-----------------------|-------------------------------------|------------------|
| Free Checking*                 | Individual      Joint | _____                               | \$ _____         |
| Direct Checking*               | Individual      Joint | _____                               | \$ _____         |
| 50+ Interest Checking*         | Individual      Joint | _____                               | \$ _____         |
| Performance Interest Checking* | Individual      Joint | _____                               | \$ _____         |
| Essential Savings*             | Individual      Joint | _____                               | \$ _____         |
| Meridian Money Market*         | Individual      Joint | _____                               | \$ _____         |
| Certificate of Deposit*        | Individual      Joint | _____ month term                    | \$ _____         |

\*Visit our website at [www.meridianbanker.com](http://www.meridianbanker.com) for [Account Details](#), [current rates](#) and [APY information](#).

### Funding Options:

|                                                                                                                                                                                |                                                                                                                                                                                                       |                                                                                                                                                                                      |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Check</p> <p>Mail check with application to:<br/>         Meridian Bank<br/>         Attn: New Accounts<br/>         16 W Market St<br/>         West Chester, PA 19382</p> | <p>ACH Transfer (include copy of voided check to verify information provided below)</p> <p>I authorize Meridian Bank to initiate an ACH transfer from my account using the following information:</p> | <p>Bank Name: _____</p> <p>Routing Number: _____</p> <p>Name on Account: _____</p> <p>Account Number: _____</p> <p style="text-align: center; font-size: small;">(Only Checking)</p> |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

## Account Activity *(excluding Certificates of Deposit)*

### Estimated Monthly Average Deposits:

| Type            | Amount | Quantity |
|-----------------|--------|----------|
| Cash            |        |          |
| Domestic Wires  |        |          |
| Foreign Wires** |        |          |
| ACH             |        |          |

### Estimated Monthly Average Withdrawals:

| Type            | Amount | Quantity |
|-----------------|--------|----------|
| Cash            |        |          |
| Domestic Wires  |        |          |
| Foreign Wires** |        |          |
| ACH             |        |          |

\*\*Reason for foreign wire activity? \_\_\_\_\_

How did you hear about Meridian Bank?    Event    Online    Newspaper    Email    Mailing    Other (Please specify)



**Primary Account Owner Information (Copy of ID required)**

|                                           |                 |                      |                           |                                                                         |                  |                               |              |                      |            |
|-------------------------------------------|-----------------|----------------------|---------------------------|-------------------------------------------------------------------------|------------------|-------------------------------|--------------|----------------------|------------|
| _____                                     |                 |                      |                           | <b>Yes</b>                                                              | <b>No</b>        | _____                         |              | _____                |            |
| <i>Name (First, M., Last)</i>             |                 |                      |                           | <i>Are you a US Citizen?</i>                                            |                  | <i>Social Security Number</i> |              | <i>Date of Birth</i> |            |
| _____                                     |                 |                      | _____                     |                                                                         | _____            |                               | _____        |                      | _____      |
| <i>Current Street Address<sup>1</sup></i> |                 |                      | <i>Apt, Unit, PO Box</i>  |                                                                         | <i>City</i>      |                               | <i>State</i> |                      | <i>Zip</i> |
| _____                                     |                 |                      |                           | _____                                                                   |                  | _____                         |              | _____                |            |
| <i>Email Address</i>                      |                 |                      |                           | <i>Home Phone</i>                                                       |                  | <i>Cell Phone</i>             |              | <i>Work Phone</i>    |            |
| _____                                     |                 |                      |                           | <b>Yes</b>                                                              | <b>No</b>        | _____                         |              |                      |            |
| <i>Driver's License No.</i>               | <i>DL State</i> | <i>DL Issue Date</i> | <i>DL Expiration Date</i> | <i>Are you or are you related to a senior foreign political figure?</i> |                  |                               |              |                      |            |
| <i>Employment Status (Choose One)</i>     |                 | <i>Employed</i>      | <i>Unemployed</i>         | <i>Retired**</i>                                                        | <i>Homemaker</i> | <i>Student</i>                |              |                      |            |

\*\*If retired, please list your previous employer and occupation

|                             |  |  |  |                 |  |  |  |  |  |
|-----------------------------|--|--|--|-----------------|--|--|--|--|--|
| _____                       |  |  |  | _____           |  |  |  |  |  |
| <i>Occupation/Job Title</i> |  |  |  | <i>Employer</i> |  |  |  |  |  |

By checking this box, I certify that everything stated on this form and on any attachments is true and correct.

<sup>1</sup>If mailing address is a PO Box, your physical street address must be included also.

**Joint Account Owner Information (Copy of ID required)**

|                                           |                 |                      |                           |                                                                         |                  |                               |              |                      |            |
|-------------------------------------------|-----------------|----------------------|---------------------------|-------------------------------------------------------------------------|------------------|-------------------------------|--------------|----------------------|------------|
| _____                                     |                 |                      |                           | <b>Yes</b>                                                              | <b>No</b>        | _____                         |              | _____                |            |
| <i>Name (First, M., Last)</i>             |                 |                      |                           | <i>Are you a US Citizen?</i>                                            |                  | <i>Social Security Number</i> |              | <i>Date of Birth</i> |            |
| _____                                     |                 |                      | _____                     |                                                                         | _____            |                               | _____        |                      | _____      |
| <i>Current Street Address<sup>2</sup></i> |                 |                      | <i>Apt, Unit, PO Box</i>  |                                                                         | <i>City</i>      |                               | <i>State</i> |                      | <i>Zip</i> |
| _____                                     |                 |                      |                           | _____                                                                   |                  | _____                         |              | _____                |            |
| <i>Email Address</i>                      |                 |                      |                           | <i>Home Phone</i>                                                       |                  | <i>Cell Phone</i>             |              | <i>Work Phone</i>    |            |
| _____                                     |                 |                      |                           | <b>Yes</b>                                                              | <b>No</b>        | _____                         |              |                      |            |
| <i>Driver's License No.</i>               | <i>DL State</i> | <i>DL Issue Date</i> | <i>DL Expiration Date</i> | <i>Are you or are you related to a senior foreign political figure?</i> |                  |                               |              |                      |            |
| <i>Employment Status (Choose One)</i>     |                 | <i>Employed</i>      | <i>Unemployed</i>         | <i>Retired**</i>                                                        | <i>Homemaker</i> | <i>Student</i>                |              |                      |            |

\*\*If retired, please list your previous employer and occupation

|                             |  |  |  |                 |  |  |  |  |  |
|-----------------------------|--|--|--|-----------------|--|--|--|--|--|
| _____                       |  |  |  | _____           |  |  |  |  |  |
| <i>Occupation/Job Title</i> |  |  |  | <i>Employer</i> |  |  |  |  |  |

By checking this box, I certify that everything stated on this form and on any attachments is true and correct.

<sup>2</sup>If mailing address is a PO Box, your physical street address must be included also.

**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 for 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 or other identifying documents.