

You and Your Business Associates

Your role

Are you a shareholder / owner or partner in the business?

☐ Yes

Percentage ownership*

☐ No

Percentage ownership mandatory if Yes is selected.

Not sure about the spinner control here – must be able to select at least whole numbers 1-100, and may need to include 2 decimal places so maybe this should just be an input text field?

We need to know who else holds one or more of these roles with your business:

- ✓ Director (if your business is a Corporation)
- ✓ Shareholder / Owner or Partner
- ✓ Will be authorized to sign and transact on the new account(s) you are opening

Add Person

Next

BACK

Skip this step

Option to skip, in case there are no other individuals involved

Add your signers to

We need to know who else has authority to act on behalf of your business

✓ Director (if your business is a corporation)

✓ Shareholder / Owner or partner

✓ Will be authorized to sign on behalf of the business

Add Person

Add a business associate

First Name*

Name

Last Name*

Name

Role- Select all that apply

☐ Director

☒ Shareholder/Owner or Partner

☐ Authorized signer

Percentage ownership*

Num %

Email*

Label

Save and add another signer

Complete

Cancel

Next

Role is a multi-select as individuals will often hold >1 of these roles. Less personal info is required if the individual is not an Authorized Signer.

% ownership is needed (AML) for all shareholders/owners or partners and must sum up to 100%.

Field would only be mandatory if Shareholder/Owner or Partner role is selected.

You and Your Business Associates

Your role

Are you a shareholder / owner or partner in the business?

☒ Yes

Percentage ownership*

50.00

☐ No

We need to know who else holds one or more of these roles with your business:

- ✓ Director (if your business is a Corporation)
- ✓ Shareholder / Owner or Partner
- ✓ Will be authorized to sign and transact on the new account(s) you are opening

Name	Email	Role(s)	% Ownership	Action
Jane Applicant	jane@email.com	Director, Shareholder or Partner, Signer	50.00%	Edit Remove Edit Remove
John Signer	john@email.com	Director, Shareholder or Partner, Signer	25.00%	
Jill Owner	jill@email.com	Shareholder or Partner	25.00%	

Add Person

First row in the table would always be name, email roles, ownership for the applicant. Cannot be removed/edited, but could change ownership and % if desired by using radio buttons and ownership box above.

Edit = reopen modal for selected individual. Remove = remove selected individual from list.

Next

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Skip this step