

You and Your Business Associates

Your role

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

Yes

Percentage ownership*

Num %

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?

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

Add Person



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Skip this step

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

Add your signers to your business

We need to know who else holds roles in your business.

- Director (if your business is incorporated)
- Shareholder / Owner or Partner
- Will be authorized to sign documents

[Add Person](#)

Add a business associate

First Name*

Last Name*

Role- Select all that apply
 Director
 Shareholder/Owner or Partner
 Authorized signer

Percentage ownership*

Email*

Save and add another signer

[Complete](#)  [Cancel](#)

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.

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

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.

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Skip this step