

# Account Agreement

Date: 11/21/2020

## Institution Name & Address

Poppy Bank  
Petaluma Office  
100 Second St.  
Petaluma, CA 94952  
(707) 636-9030

## Owner/Signer Information 1

Name	Kevin Tyler		
Relationship	Owners		
Address	123 Happy Dr, Petaluma, CA 94952		
Mailing Address (if different)	PO Box 123, Petaluma CA 94954		
Gov't Issued Photo ID (type, number, state, issue date, exp. date)	Drivers License D234354 CA	Issued: 10/07/2017 Expires: 10/18/2022	
Other ID (description, details)	Credit Card Visa	Expires: 02/28/2023	
Employer	Poppy Bank, New Accounts/CSR-Poppy Bank		
Previous Financial Inst.			
E-Mail	diaz1234@gmail.com		
Work Phone			
Home Phone:	(707) 778-7756	Mobile Phone:	(123) 456-7890
Birth Date:	10/18/1991	SSN/TIN:	123-34-2134

## Ownership of Account

The specified ownership will remain the same for all accounts.

☐ Individual  
☐ Joint Account  
☐ Joint - Spouses (With right of survivorship)  
☐ Community Property (Spouses)  
☐ Tenancy in Common  
  
☐ Sole Proprietorship or Single Member LLC    ☐ Partnership  
☐ LLC-enter tax classification (☐ C Corp ☐ S Corp ☐ Partnership)  
☒ C Corporation    ☐ S Corporation    ☐ \_\_\_\_\_  
☐ Trust-Separate Agreement Dated: \_\_\_\_\_  
☐ \_\_\_\_\_

## Beneficiary Designation

(Check appropriate ownership above.)

☐ Totten Trust    ☐ Pay-On-Death (POD)  
☐ \_\_\_\_\_

## Beneficiary Name(s), Address(es), and SSN(s)

(Check appropriate beneficiary designation above.)

Internal Use	213213	Officer
<b>Account Title &amp; Address</b>		
Oakmont Management Group Agent FBO Custom Curtains 123 Main St Santa Rosa, CA 94949		

Enter **Non-Individual Owner Information** on page 2. There is additional **Owner/Signer Information** space on page 2.

☐ If checked, this is a temporary account agreement.

Number of signatures required for withdrawal: 1.

## Signature(s)

The undersigned authorize the financial institution to investigate credit and employment history and obtain reports from consumer reporting agency(ies) on them as individuals. Except as otherwise provided by law or other documents, each of the undersigned is authorized to make withdrawals from the account(s), provided the required number of signatures indicated above is satisfied. The undersigned personally and as, or on behalf of, the account owner(s) agree to the terms of, and acknowledge receipt of copy(ies) of, this document and the following:

- ☒ Terms & Conditions    ☒ Truth in Savings    ☒ Funds Availability  
☒ Electronic Fund Transfers    ☒ Privacy    ☒ Substitute Checks  
☐ Common Features    ☐ \_\_\_\_\_  
☒ Authorized Signer (See Owner/Signer Information for Authorized Signer designation(s).)

The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

(1): ☒ ]  
 Kevin Tyler  
 I.D. # 123-34-2134    D.O.B. 10/18/1991

(2): ☒ ]  
 Courtney Siegel  
 I.D. # 123-34-2134    D.O.B. 10/18/1991

(3): ☒ ]  
 Matthew Stevenson  
 I.D. # 123-34-2134    D.O.B. 10/18/1991

(4): ☒ ]  
 James Meek  
 I.D. # 123-34-2134    D.O.B. 10/18/1991

Owner/Signer Information 2	
Name	Courtney Siegel
Relationship	Owners
Address	123 Happy Dr, Petaluma, CA 94952
Mailing Address (if different)	PO Box 123, Petaluma CA 94954
Gov't Issued Photo ID (type, number, state, issue date, exp. date)	Drivers License D234354 CA Issued: 10/07/2017 Expires: 10/18/2022
Other ID (description, details)	Credit Card Visa Expires: 02/28/2023
Employer	Poppy Bank, New Accounts/CSR-Poppy Bank
Previous Financial Inst.	
E-Mail	diaz1234@gmail.com
Work Phone	(707) 778-7756
Home Phone: (707) 778-7756	Mobile Phone: (123) 456-7890
Birth Date: 10/18/1991	SSN/TIN: 123-34-2134

Owner/Signer Information 3	
Name	Matthew Stevenson
Relationship	Owners
Address	123 Happy Dr, Petaluma, CA 94952
Mailing Address (if different)	PO Box 123, Petaluma CA 94954
Gov't Issued Photo ID (type, number, state, issue date, exp. date)	Drivers License D234354 CA Issued: 10/07/2017 Expires: 10/18/2022
Other ID (description, details)	Credit Card Visa Expires: 02/28/2023
Employer	Poppy Bank, New Accounts/CSR-Poppy Bank
Previous Financial Inst.	
E-Mail	diaz1234@gmail.com
Work Phone	(707) 778-7756
Home Phone: (707) 778-7756	Mobile Phone: (123) 456-7890
Birth Date: 10/18/1991	SSN/TIN: 123-34-2134

Owner/Signer Information 4	
Name	James Meek
Relationship	Owners
Address	123 Happy Dr, Petaluma, CA 94952
Mailing Address (if different)	PO Box 123, Petaluma CA 94954
Gov't Issued Photo ID (type, number, state, issue date, exp. date)	Drivers License D234354 CA Issued: 10/07/2017 Expires: 10/18/2022
Other ID (description, details)	Credit Card Visa Expires: 02/28/2023
Employer	Poppy Bank, New Accounts/CSR-Poppy Bank
Previous Financial Inst.	
E-Mail	diaz1234@gmail.com
Work Phone	(707) 778-7756
Home Phone: (707) 778-7756	Mobile Phone: (123) 456-7890
Birth Date: 10/18/1991	SSN/TIN: 123-34-2134

**Important Account Opening Information.** Federal law requires us to obtain sufficient information to verify your identity. You may be asked several questions and to provide one or more forms of identification to fulfill this requirement. In some instances we may use outside sources to confirm the information. The information you provide is protected by our privacy policy and federal law.

Non-Individual Owner Information	
Name	Oakmont Management Group Agent
State/Country & Date of Organization	
Nature of Business	
Address	
Mailing Address (if different)	
Authorization/Resolution Date	
Previous Financial Inst.	
E-Mail	
Phone	
EIN: 12-345676	Mobile Phone:

Account Description	Account #	Initial Deposit/Source
1232	213213	\$ <input type="checkbox"/> Cash <input type="checkbox"/> Check <input type="checkbox"/> _____
		\$ <input type="checkbox"/> Cash <input type="checkbox"/> Check <input type="checkbox"/> _____
		\$ <input type="checkbox"/> Cash <input type="checkbox"/> Check <input type="checkbox"/> _____

Services Requested	
<input type="checkbox"/> ATM <input type="checkbox"/> _____ <input type="checkbox"/> _____	<input type="checkbox"/> Debit/Check Cards (No. Requested: _____) <input type="checkbox"/> _____ <input type="checkbox"/> _____

Backup Withholding Certifications	
(If not a "U.S. Person", certify foreign status separately)	
<input checked="" type="checkbox"/> By signing signature field (1) on this document, I certify under penalties of perjury that the statements made in this section are true and that I am a U.S. citizen or other U.S. person (as defined in the instructions).	
<input checked="" type="checkbox"/> <b>Taxpayer I.D. Number - TIN:</b> 44444444 The Taxpayer Identification Number (TIN) shown is my correct taxpayer identification number.	
<input checked="" type="checkbox"/> <b>Backup Withholding.</b> I am not subject to backup withholding either because I have not been notified that I am subject to backup withholding as a result of a failure to report all interest or dividends, or the Internal Revenue Service has notified me that I am no longer subject to backup withholding.	
<input type="checkbox"/> <b>Exempt Recipients.</b> I am an exempt recipient under the Internal Revenue Service Regulations. Exempt payee code (if any) _____	
<b>FATCA Code.</b> The FATCA code entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.	

Other Terms/Information