

WBA Account Titling

handbook

A comprehensive handbook will give you guidance for opening accounts from basic to some of the most unique!

The newly revised WBA Account Titling Handbook includes:

- Titling of Personal Accounts
- Titling of Business Accounts
- Titling of Fiduciary Accounts
- Titling and Documentation of Municipal Accounts
- Designation of Agent (POA)
- Designation of POD Beneficiary
- Taxpayer Identification Numbers (TINs)
- Customer Identification Program (CIP)
- Customer Due Diligence Rule (CDD) Beneficial Owner
- Special Rules for Certificates of Deposit
- Nontransferable Accounts
- Retitling Accounts


ORDER YOUR COPY TODAY!


CONTACT NAME		FIPCO CUSTOMER #	
INSTITUTION			
INSTITUTION ADDRESS AND P.O. BOX			
CITY	STATE	ZIP	COUNTY
E-MAIL ADDRESS	BUSINESS PHONE		BUSINESS FAX


PURCHASE OPTIONS: *(Send no money now. Invoice will be mailed after shipment and will include appropriate tax)*

QUANTITY	PRICING (INCLUDES SHIPPING)	SUB TOTAL (BEFORE TAXES)
	WBA Member - \$250.00	
	non-WBA Member - \$395.00	

 **800-722-3498**

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