

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	HARD COPY PRICING: <i>(Includes shipping)</i>	ELECTRONIC PRICING:	SUB TOTAL (BEFORE TAXES)
	WBA Member - \$265.00	WBA Member - \$375.00	
	Non-WBA Member - \$415.00	Non-WBA Member - \$525.00	

I understand that by purchasing the electronic format of the 2017 WBA Account Titling Handbook, it is for internal use only on the bank's intranet.

 **800-722-3498**

 fipcosales@fipco.com

 www.fipco.com

 4721 South Biltmore Lane
Madison, WI 53718

FIPCO
COMPLIANT. CONSISTENT. CONFIDENT.