





**Type of Account**

Select the Type of Account You Wish to Open (Minimum Deposit \$25; except for CDs, which is \$250)

- |  |   |
|--|---|
| <input type="checkbox"/> Checking          | <input type="checkbox"/> Certificate of Deposit (circle desired term below) |
| <input type="checkbox"/> Interest Checking | 30 days      12 months      3 years   |
| <input type="checkbox"/> Savings           | 90 days      8 months      4 years  |
| <input type="checkbox"/> Money Market      | 180 days      2 years      5 years  |

**Additional Services**

- ATM Card (not available on CDs). Number of cards requested \_\_\_\_\_
- Online Banking
- Online Bill Pay (not available on Savings, Money Markets and CDs)

**Initial Deposit Method (Select One)**

- Check Enclosed      Amount \$ \_\_\_\_\_

Include a personal check, cashier's check or money order made payable to you and endorsed with your signature and "For Deposit Only"

- Transfer from Existing Account ( Checking or  Savings - **if checking, attach voided check**) Amount \$ \_\_\_\_\_

Financial Institution \_\_\_\_\_ Routing Transit # (9 digits) \_\_\_\_\_ Account # \_\_\_\_\_

**Signatures**

_____	_____	_____	_____
Applicant	Date	Co-Applicant	Date



## Deposit Account Application - Instructions

It should take you about 5 minutes to complete your application for an H&R Block Bank personal bank account. This form can be used to request a checking, savings, money market or certificate of deposit (CD) account. If you want to open an IRA, please visit our website ([www.hrbbank.com](http://www.hrbbank.com)) and download the IRA application form or call 1-800-hrblock and select the Bank option to request it.

You will need the following information available for the account owner (and joint owner, if applying for a joint account) to complete this form.

- Social Security Number (SSN) or Taxpayer Identification Number (TIN)
- Drivers license or other government-issued ID such as a passport, state ID or Matricula Consular Card
- Prior address, if at current address less than five years
- Contact phone numbers and e-mail address
- Existing bank account information (if making your initial deposit from an existing account)

### **Application Process**

- Please complete the application, providing your personal information so that we may verify your identity and properly setup your account if approved.
  - Be sure to indicate how you want to make your initial deposit (transfer from an existing account or by personal check, cashier's check or money order)
  - Be sure to sign your application
- Mail or FAX your application to the following:
  - FAX to 816-572-6160 (only if initial deposit is via transfer from an existing account)
  - Or Mail your application to:

H&R Block Bank  
P.O. Box 10364  
Kansas City, MO 64171-0364

- Once we receive your signed application and opening deposit, we will process your application. Upon approval, we will mail an H&R Block Bank Welcome Kit to you. It will contain your new account number and information, product disclosures, interest rates if applicable and further instructions for accessing your account. Debit cards, ATM cards and online account access information will be sent separately.
- Section 326 of the Federal USA Patriot Act requires all financial institutions to verify the identity of any person seeking to open an account. This law mandates that we verify certain information about you while processing your account application.
- If you have supplied an e-mail address, this will be the primary means used to communicate with you until your account is opened. If not, we will use the phone numbers you have provided in your application. No account or personal information will be mailed to you.

### **Account Access**

With an H&R Block Bank account, we offer several convenient ways to access your personal account. All account holders can access their account via H&R Block's In-Touch (telephone banking) system by simply calling 1-800-hrblock. You can also sign up to access your account via the Internet by selecting "Online Banking" under Additional Services in the Type of Account section of this application. Depending on the type of account you have requested, you may also request ATM/Debit cards to access your account. Upon being approved, personalized checks can be ordered online at [www.hrbbank.com](http://www.hrbbank.com).