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 coast360fcu.com

COAST ONLINE PRO APPLICATION

Company Information	
Request: <input type="checkbox"/> New Setup <input type="checkbox"/> Change <input type="checkbox"/> Delete	Member Number:
Company Name:	Federal Tax ID:
Email Address (For eStatement):	Contact Number:
Mailing Address:	Physical Address:

Required Security Information	
Requested Company ID (Case-sensitive):	Company Security Question Answers (Case-sensitive): <ul style="list-style-type: none"> Color of First Car: Last Name of Favorite Teacher:

Authorized User(s)			
Company Administrator Name:	Standard Access:	<input type="checkbox"/> Information Reporting <input type="checkbox"/> Account Transfer <input type="checkbox"/> Stop Payment Request	Credit Union Use Only: <input type="checkbox"/> Authorized Signer ___ # of Req. Approval(s)
User ID (Case-sensitive):			
Email:	Extended Services:	<input type="checkbox"/> Payee Maintenance <input type="checkbox"/> ACH Origination <input type="checkbox"/> Wire Transfer Request	Limit \$ _____ / mo. Limit \$ _____ / mo.
Contact Number:	(Complete page 2 – Extended Services Request)		
Name:	Standard Access:	<input type="checkbox"/> Information Reporting <input type="checkbox"/> Account Transfer <input type="checkbox"/> Stop Payment Request	Credit Union Use Only: <input type="checkbox"/> Authorized Signer ___ # of Req. Approval(s)
User ID (Case-sensitive):			
Email:	Extended Services:	<input type="checkbox"/> Payee Maintenance <input type="checkbox"/> ACH Origination <input type="checkbox"/> Wire Transfer Request	Limit \$ _____ / mo. Limit \$ _____ / mo.
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User ID (Case-sensitive):			
Email:	Extended Services:	<input type="checkbox"/> Payee Maintenance <input type="checkbox"/> ACH Origination <input type="checkbox"/> Wire Transfer Request	Limit \$ _____ / mo. Limit \$ _____ / mo.
Contact Number:	(Complete page 2 – Extended Services Request)		

Authorization	
<p>By signing below, I/we certify and agree to the terms and conditions of the Business & Non-Personal Application & Account Agreement, Non-Personal & Business Membership Information Booklet, Acceptance of Electronic Statements & Disclosures Consent to Receive Electronic Disclosures, Share Rates, Fee Schedule, Coast Online Pro Agreement and Coast Online Pro Agreement – ACH Services Addendum, if applicable, as amended by the Credit Union from time to time. The extended services are subject to approval and Coast360 may require additional documentation and financial information about the entity and/or principal owner(s) of the entity. Coast360 may obtain a personal credit report on the business owner(s) / principal(s) to assist in assessing our creditworthiness. I/we authorize Coast360 to obtain a credit report as part of the application process. I/we represent and warrant that I/we are acting with full authority for the entity applying for Coast Online Pro services, and that I/we are duly authorized to submit this request.</p>	
Signature(s) of Authorized Signer(s):	_____
Name(s) and Title(s):	_____
Date:	_____

FOR COAST360 FEDERAL CREDIT UNION USE:	
Credit Limits: ACH Origination Limit \$ _____	Wire Transfer Limit \$ _____
No. of Authorized Signatures Required to Transact Business _____	

RECEIVED BY:		REVIEWED BY:		PROCESSED BY:		VERIFIED BY:	
Teller No./ Initials	Date	Teller No./ Initials	Date	Teller No./ Initials	Date	Teller No./ Initials	Date

Thank you for your interest in using ACH and/or Wire services with Coast Online Pro. In order to process your request, select which extended service(s) you are interested and complete the additional information below regarding your business needs. A Member Business Relations Officer will be in contact with you within 2 business days to complete your request. Please note that ACH/Wire services are available pending credit approval.

ACH Origination Services

- Anticipated Transaction Summary

Requested Company ACH Monthly limit: \$ _____ Number of files (per month) _____

Average ACH transfer amount: \$ _____ Frequency: Daily
 Weekly
 Bi-weekly
 Monthly

Type of funds to be sent:

- Pay Vendors
- Account Transfers
- Refunds/ Reimbursements
- Other: _____

Wire Transfer Services

- Anticipated Transaction Summary

Requested Company Wire Monthly limit: \$ _____ Number of files (per month) _____

Average Wire transfer amount: \$ _____ Frequency: Daily
 Weekly
 Bi-weekly
 Monthly

Purpose for wire transfers:

COAST360 CREDIT REVIEW:

THE FOLLOWING DOCUMENTATION MAY BE REQUIRED:

- Business Plan or Business Background Information
- Coast360 - Certification Regarding Beneficial Owners of Legal Entity
- Personal Financial Statement for all Guarantors
- Individual Tax Returns with Schedule C (2-3 years)
- Corporate Tax Returns (2-3 Years)
- Business Financial Statements
- Interim Financial Statements
- Annual Report
- Credit Report Fee of \$10 per Guarantor
- Other: _____
- Other: _____