



# IRA Pre-Application

A government issued IRA Form will be sent to you to complete the IRA applicaiton process.

Return via Fax: **866-913-5087**  
 or  
 Mail to: **Farm Bureau Bank**  
**P.O. Box 33427**  
**San Antonio, Texas 78265-9865**

**1. Please Tell Us About Yourself:** (All information is required)

First Name	MI	Last Name	Date of Birth	
Social Security Number		Farm Bureau Member Number	County of Membership	State of Membership
Mailing Address		City	State	Zip
Physical Address (If different from above)		City	State	Zip
Home Phone #	Work or Alternate Phone #	Driver's License #	State	
Mother's Maiden Name	Present Employer or Business	Email Address		

**2. IRA Information:**

Select Type of IRA  
 Traditional     Roth     Coverdell Educational Savings Account

Select Contribution Type  
 New Contribution     Transfer from a qualified plan or an existing IRA     Rollover from a qualified plan or an existing IRA

**3. Account Information:**

<b>MONEY MARKET SAVINGS ACCOUNT IRA</b> \$250 Minimum to open any Money Market IRA Initial Deposit Amount (Make Check Payable to Farm Bureau Bank FSB) \$ _____ Account Access Options <input type="checkbox"/> YES, I'd like Internet access. <input type="checkbox"/> YES, I'd like the E-Option, (Internet access required) (I understand by selecting E-Option, I will receive my monthly statements electronically.)	<b>CERTIFICATE OF DEPOSIT IRA</b> \$1000 Minimum to open a Certificate of Deposit (CD) Initial Deposit Amount (Make Check Payable to Farm Bureau Bank FSB) \$ _____ Term <input type="checkbox"/> Months <input type="checkbox"/> Years    Maturity Date Requested ____/____/____ Rate _____ %    APY _____ %
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**4. Deposit Account Beneficiary:**

Name of Beneficiary/POD Payee	Social Security Number	Date of Birth	Percentage
	- -	m m d d y y	(Total must equal 100%) %
Name of Beneficiary/POD Payee	Social Security Number	Date of Birth	Percentage
	- -	m m d d y y	(Total must equal 100%) %

**Please Sign Below**

Under penalty of perjury, I/we certify that: (1) The number shown on this form is my correct Social Security number and (2) I am not subject to backup withholding either because I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of failure to report all interest and dividends or the IRS has notified me that I am no longer subject to backup withholding. Cross out and initial statement #2 if you have been notified that you are subject to backup withholding. (3) I/we understand that my/our account is bound by the terms and conditions specified in the Deposit Account Agreement and disclosures that will be sent to me upon opening of my account. My signature authorizes Farm Bureau Bank FSB to open the account(s) I have indicated above.

IMPORTANT INFORMATION ABOUT PROCEDURES FOR OPENING A NEW ACCOUNT: To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify and record information that identifies each person who opens the account. What this means for you: When you open an account, we will ask for your name, address, date of birth and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents.

Applicant's Signature \_\_\_\_\_ Date \_\_\_\_\_

A Government Issued IRA Form will be sent to you to complete. I would like this information sent via  Mail  Fax # \_\_\_\_\_

Agent Name: \_\_\_\_\_ Referral Source Code \_\_\_\_\_ FSR/BSR Code \_\_\_\_\_

By entering this information, I understand that this Farm Bureau Agent has requested that Farm Bureau Bank, P.O. Box 33427 San Antonio, TX 78265-9865, establish an account for me. Information pertaining to your application may be shared with your agent in order to assist in the application process. To inquire about the status of your application, you may contact your Farm Bureau Agent or you may contact Farm Bureau Bank directly at 800-492-3276.

ITC: _____	OPENED	LETTER	CHECKS	DEBIT	AUDIT	SCANNED
Account Number: _____						