

## What to expect when you become a signer at Heritage Bank

- You must either come in or fill out a Customer Information Sheet to be added into the system and provide a copy of your drivers license
  - Emailing can save you an extra trip if you are comfortable with that method
  - You may also drop it off in person so we can add you
- Once ALL signers of the account are into the system, we contact you to come in to sign
  - This can be done in person in front of a Heritage Bank employee or through a secure email format such as DocuSign
  - You do not all have to come in at the same time as the other signers
  - We can send the documents to another branch if it's more convenient for you
  - Documents cannot be created unless all of the signers have been entered into the system
- Anytime a signer on the account changes ALL signers must sign new documents
  - If a signer needs changing, a board member needs to be notified as new Meeting Minutes designating the removal of the previous signer and adding a new signer to the account need to be entered into record
- Heritage Bank at 2831 Colby Ave in Everett, (425) 355-7375, is the home branch for the accounts. You may deposit funds at any Heritage Bank location

### Heritage Bank hours:

#### Lobby

9:00AM to 5:00PM Monday through Friday

#### Drive-up

9:00AM to 5:00PM Monday through Thursday

9:00AM to 5:30PM Friday

Hours subject to change, check [Heritagebanknw.com](http://Heritagebanknw.com) for current hours at each location

