



100 Boston Turnpike Rd. Ste. J9B – Shrewsbury, MA 01545
Ph. 508-233-8373 fax 888-877-2603 email: Friendsmoneymanager@gmail.com

Enrollment Checklist

Once completed the fully signed and notarized original forms need to be mailed to Friends Money Manager. We cannot enroll a client or open a bank account without the originally signed and notarized forms. Please keep a copy for your records, or also fax or email us a copy.

*All forms should be printed single sided.

_____ Complete an Enrollment form, online or paper. The Enrollment Form does not need to be notarized.

_____ Signed in two places and notarized Enrollment Verification form

_____ Signed and notarized Power of Attorney

_____ A CLEAR copy of a current (not expired) MA. Driver's license, MA. ID or U.S. Passport. (We can accept an emailed or texted smartphone photo of the person's ID. A photo is often better for clarity than a copy. The bank only needs the front side of the ID.)

*Note: All ID's the bank will accept to open an account have an expiration date on the ID. **If the ID we receive is expired or does not have an expiration date, we will not notify you.** We will put the enrollment on hold for up to six months. If we do not receive a current ID within 6 months of the date on the Power of Attorney, the submitted forms will be destroyed. Please check the expiration date prior to sending. Please contact us regarding any exceptions to this prior to sending.

Please mail signed originals to:

Friends Money Manager

100 Boston Turnpike Rd. Ste. J9B

Shrewsbury MA. 01545



Friend\$ Money Manager is Rent \$ecure Inc. company



Friendsmoneymanager.com