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# Setting up your business account

A simple guide to help you get started





## Save time setting up your accounts with this helpful guide

This guide can help you quickly and easily prepare to open a business checking or savings account. Gather the documents outlined here to begin the process of getting your accounts up and running.

To open a business account, all banks are required by law to obtain certain information verifying a business and the individuals associated with it.

### Owners, partners, and key executives need to be present at account opening. Please provide:

- Two forms of personal identification, one of which is issued by a government agency — for example, a driver's license or passport.
- Taxpayer Identification number for both the business and the individuals, such as Employer Identification number for the business or Social Security number for the individual.

### Bring appropriate documents to help verify your business

We have included a quick reference list showing examples of documents for various business types.

If you have any questions or need more information, talk to your banker. Call **1-800-359-3557** or visit [wellsfargo.com/businessdocuments](https://www.wellsfargo.com/businessdocuments).

### Document names may vary in different states.

Based on your business type, bring the original or a certified copy of **one** of the following or the appropriate document issued by a government agency:

#### Sole Proprietor

If the business name does not use the legal first and last name of the owner, bring one of the following:

- Fictitious Name Certificate or Statement
- Certificate of Assumed Name
- Business License
- Registration of Trade Name

#### Partnerships

##### General Partnership

- Partnership Agreement
- Fictitious Name Certificate or Statement
- Certificate of Assumed Name
- Business License

If you don't have one of the above and you have not filed the appropriate documents with a government agency, bring a written statement signed by all partners indicating no written Partnership Agreement exists. If you don't have documents issued by a government agency, all authorized signers need to be present in the branch when the account is opened.

##### Limited Partnership

- Certificate of Limited Partnership
- Limited Partnership document

##### Limited Liability Partnership

- Statement of Qualification
- Limited Partnership document
- Limited Liability Partnership Election

#### Limited Liability Company

- Articles of Organization
- Certificate of Organization
- Certificate of Formation

#### Corporation

- Articles of Incorporation
- Certificate of Good Standing

#### Social or Recreational Clubs, Unincorporated Associations, Civic Groups, and Community Organizations

- Business License
- Fictitious Name Certificate or Statement
- Certificate of Assumed Name
- Organization/Association Articles or Bylaws
- Certificate of Good Standing, Certificate of Formation, or Certificate of Organization
- Statement of Organization
- Certificate of Registration

If you don't have one of the above or comparable documentation issued by a government agency, please provide governing documentation for your business entity such as board resolutions and meeting minutes. If you don't have documents issued by a government agency, all authorized signers need to be present at the branch when the account is opened.

# How can we help?

## Visit us

Visit your local Wells Fargo branch.

To find a branch near you, go to [wellsfargo.com/locator](https://wellsfargo.com/locator) for branch hours or to make an appointment.

## Call us

To apply for a new account: **1-800-359-3557**.

## Go online

For information on products and services, go to [wellsfargo.com/biz](https://wellsfargo.com/biz).

For resources, educational information, and more, go to [wellsfargoworks.com](https://wellsfargoworks.com).