



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.

\*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.

Please mail signed originals to:

**Friends Money Manager**

**100 Boston Turnpike Rd. Ste. J9B**

**Shrewsbury MA. 01545**



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**Friendsmoneymanager.com**