

Business Needs Assessment



PeoplesBank
A Codorus Valley Company

At PeoplesBank, we understand the challenges you face on a daily basis when operating your business. That's why we'd like to put our more than 150 years of experience to work for you by developing a customized banking solution to meet your financial needs. Please take a moment to answer the following questions so that we can learn more about your banking activity, and then we'll work hard to develop a plan that will hopefully save you both time and money and make banking simpler for you.

888.846.1970
peoplesbanknet.com



Business Information

Sole Proprietor Partnership Corporation LLC LLP Non-Profit Corp Club

Briefly describe the nature of your business: _____

How long has your company been in business? _____

Business Checking

Average monthly balance:

\$0 to \$1,000 \$1,001 to \$9,999 \$10,000 and above

Number of check written per month:

0 to 50 51 to 100 101 to 200 201 and above

Number of deposits made monthly:

1 to 20 21 to 40 41 to 75 76 and above

How many checks are in a normal deposit:

1 to 5 6 to 20 21 to 40 41 and above

Business Services

What services would you most likely use?

Night Depository Remote Deposit Capture
(Send your check deposits electronically)

Merchant Services (MasterCard, VISA, Discover,
American Express) Business Debit Card

Business Online Banking Bill Pay

Direct Deposit Overnight Investments

Other Business Products

Business Line of Credit Business Credit Card

Business Money Market Business CDs

Other Areas of Interest

Business Retirement Planning Business Insurance Needs

Please fax or email a copy of this form to the following:

Name _____

Fax _____ Email _____

Your Contact Information:

Business Name _____

Contact Person _____ Phone _____

Fax _____ Email _____

