

# Safe Deposit E-Z Guide

## Renting a box

1. Do they have an account ( auto debit annual rental )
2. 2 forms of I.D. required to rent a box
3. Determine box size, location in vault & retrieve keys
4. Fill out lease agreement completely (must be error free)
5. Verify signatures on lease agreement
6. Have customer sign vault entry record or access ticket
7. Enter vault with customer
8. Unlock the box in presence of customer
9. Check that both keys work properly
10. File lease agreement and all corresponding paperwork in their proper place
11. Input safe box information on computer system

## Accessing a box

1. Ask for I.D.
2. Have customer sign vault entry record or access ticket
3. Verify signatures to lease agreement
4. Enter vault with customer
5. Unlock the box in presence of customer. Be sure to use the correct guard key
6. Escort customer to viewing area or room
7. When customer is finished, check viewing area to insure nothing is left behind
8. Relock box and return customers' key
9. **Never leave your Guard Keys unattended or in customers lock!**

## Closing a box

1. Follow steps 1 thru 7 for accessing a box
2. Inspect that bond tin is empty in the presence of customer
3. Check both returned keys in lock
4. Have customer sign release on contract
5. File lease agreement and all corresponding paperwork in their proper place
6. Update safe box status on computer system

## Remember

1. Never say your vault is Burglar, Bomb or Fire "Proof"... It Is "Resistant"
2. Box contents are **not insured** by any federal or state regulatory agency (FDIC or NCUA)
3. Whenever a situation arises that is questionable immediately consult your manager and/or your financial organizations Legal Council

For Superior Customer Service We Are Your **A** Team

[www.advancetecsafedeposit.com](http://www.advancetecsafedeposit.com)