



Getting Started with Bento for Business

Application and Funding Account

Apply:

<https://app.bentoforbusiness.com/promo/newday3>



Quick sign up and approval. No credit checks, no personal guarantees.



Import your employee roster and order cards for your entire team with just a couple of clicks.



Ship cards to your main office or directly to employees' homes.



Download and use the Bento mobile app to manage everything on the go.

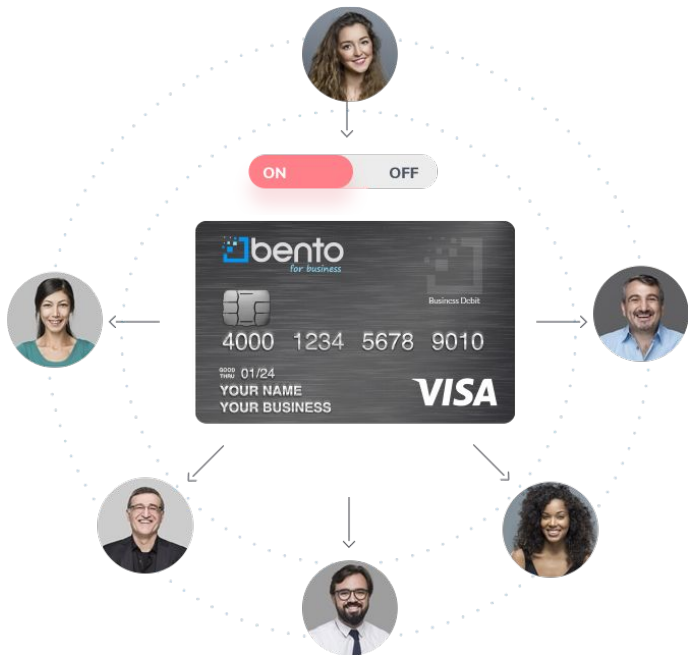


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www.bentoforbusiness.com



Best Practices:

1. Don't fake information if you don't know it, it'll slow down the process. Reach out to julie.george@bentoforbusiness.com or 773.250.7869 if you have questions.
2. To keep the application process moving forward please have business documents available to upload - in the event you aren't able to be automatically approved.
* Please note we are unable to accept EIN documents for business verification.
 - a. Drivers License or Passport of Applicant(s)
 - b. Legal Business Documents (Articles of Organization/Incorporation)
 - c. Address Verification (Lease, Utility Bill, Bank Statement)
3. You cannot create cards until you fund your Bento account. Wire transfers and ACH transfers are the fastest option, but you can also link your bank account and fund it that way.
4. Virtual cards are available for use instantly after you fund your account - set up a card for your online payments (utilities, subscriptions, etc.) or add to a mobile wallet.



Getting Started

Apply

Bento Application

1 to 3 Days

Business Owner /Controller
/ Finance Leader

Verifying Individual and
Business Information.
Automatic or Manual
Review Process.

Fund

Fund Account

1 to 3 Days

Business Owner /Controller /
Finance Leader

Fund your Bento Account in
One of Three Ways.
Set up automatic or low
balance deposits.

Spend

Create Cards & Admin Training

7-10 Days

Business Owner /Controller /
Finance Leader

Set card controls and fund
cards. Users notified via
email and download mobile
app or access on desktop.

Optimize

Trainings & Account Reviews

Ongoing

Business Owner /Controller
/ Finance Leader

Continue to create cards,
set up departments, create
alerts, & auto loads if
applicable. Work with
Bento for additional use
case/setup needs. Map
accounting system.

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Apply

First Name/Last Name: Name of the person who is performing the enrollment

Registered Business Name: Legal name of the corporation, partnership, non profit.

Company Phone Number: Phone number for the company

Select role in company: Owner or Officer. It's OK to be an officer and own 0% of the company

Promo Code: Enter Promo Code if you have one

Create login credentials: Email Address and Create Password.
This is used to log into your Bento account.



Create Your Bento Account

Tell us a little about you and your business

First Name *

Required

Last Name *

Registered Business Name *

Company Phone Number *

Select role in company below ? *

Promo Code

Create your login credentials

Email Address *

Confirm Email Address *

Password *

Confirm Password *

☐ I have read and agree to the [Agreement to Receive Electronic Communications](#).

☐ I have read and agree to the [Deposit Account Agreement](#).

Enroll

Already have an account? [Login](#)

By continuing, I agree to the [Terms of Service](#)



Apply

Business address registered with the government: Enter the the address of the primary **physical location** from where you operate the majority of business. You should not enter a PO Box, UPS Store, etc.

Business address and mailing address are the same checkbox:

The default mailing address is where cards will be shipped to, so if you want cards to be sent to another address, you should enter it below.

Employer Identification Number (EIN): Sometimes also called a Tax ID number.

Business address registered with the government *

Note: No PO Boxes allowed

Apartment, suite, floor, etc.

City *

State *

Zip *

☐ Business address and mailing address are the same

Mailing address *

Note: This is where your cards will be delivered to

Apartment, suite, floor, etc.

City *

State *

Zip *

Employer Identification Number (EIN) ? *



Apply

This is a bit misleading, as really this is still ***the information of the person who has started the sign up process*** (i.e. it could be an officer, not the business owner). The person should still be entering their own information.

Job Title: CEO, COO, CFO, etc.

Mobile Phone Number: Important for communications and alerts as well as account verification

Date of Birth: Date of birth of the person who is enrolling

Home Address: This is the home address- The person enrolling should not put the business's address unless the primary business location is their home.

Social Security Number: If the person does not have an SSN, they can enter a Tax ID Number, or the first 9 digits of their foreign ID. In those cases, we will ask for subsequent documentation.

Percentage of Business Owned: It's OK if you enter "0" if that's accurate. We do not require a minimum ownership percentage to set up an account

"There are no additional business owners with 25% or more ownership in the company"

checkbox: Leave this box checked.

For regulatory purposes, we are required to verify both your business and the business owner/officer's information.

Information you may need: Employer Identification Number (EIN), Type of Business Structure and Business Address & Contact Information

First Name *

Tim

Last Name *

Timms

Job Title *

Mobile Phone Number *

000-000-0000

Date of Birth *

MM/DD/YYYY

Search street address

Home address *

Apartment, suite, floor, etc.

City * State * Zip *

Social Security Number *

Why do we need this?
The USA PATRIOT ACT requires Bento to verify your identity.

Percentage of Business Owned *

e.g. 0 - 100

☒ There are no additional business owners with 25% or more ownership in the company.

Continue

IMPORTANT INFORMATION ABOUT PROCEDURES FOR OPENING A NEW BUSINESS ACCOUNT: To help the government fight the funding of terrorism and money laundering activities, federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens a Business Account. What this means for you: When you open a Business Account, we will ask



Apply

This page allows you to review the information you have entered and make any corrections. If all data is correct, check the box to confirm the mailing address of the cards.

Review your application

Reviewing for typos and accuracy of information is important.
This will have no effect on your credit score.

Business information

Legal name registered with the state government / DBA
(Not always the name your business goes by)

Tim Timms LLC
866-220-8455
S Corporation
46-0345921

Registered business address
(Not always the same address as your office address)

1234 Divisadero Street
San Francisco, CA 94115

Mailing address
(This is where your cards will be delivered to)

1234 Divisadero Street
San Francisco, CA 94115

Edit

☐ By checking this box, you are confirming the card shipment address displayed above is correct.

Save and continue

Officer information

Tim Timms
sean+ttim@bentoforbusiness.com
415-887-2028
January 1, 1990
●●●-●●-1023
10%

Edit



Apply

If you have entered all information accurately, and we are able to verify it against the data sources we use, you will be auto-approved and can move on to bank linking.

If not, we will ask you for additional documentation to verify the business or their own personal information. These documents need to be manually reviewed by Bento Operations and the screen to the left appears.

Once we receive sufficient info to verify the business and individuals and your account is approved, you will receive notification via email and can move onto Bank Linking

Final step for approval

Please upload the following documents. Supported file types: .pdf, .png, .jpeg, .jpg

Email and fax options below.

1. Business Documents

Upload one of the acceptable forms of documentation

- Articles of Organization
- Articles of Incorporation
- Certificate of Good Standing

Drag or select file here



2. Personal Documents

Upload one of the acceptable forms of documentation

- U.S. Passport
- U.S. Driver's license
- U.S. Government issued ID

Drag or select file here



Submit my documents

Or send documents via:



Email

Scan or take a photo of the requested documents with your mobile phone and email to:
support@bentoforbusiness.com



Fax

Fax your documents to:
855-547-2896

☐ I will email/fax my documents

Fund Your Account

It is not necessary to link your bank account. You can fund your Bento account in one of three ways.

Bento Transfer

- Control funding from Bento
- Auto-load capability
- Uses ACH
- Slower

Wire

- Fastest funding method
- No visibility from Bento
- Initiated externally
- Your bank may charge a fee

Bank Transfer

- Faster
- Uses ACH
- Initiated externally

Link your bank account to get started

In order to begin using your Bento Account, you'll need to add funds to it

First, you need to link your account. This allows you to move funds from your bank to your Bento Account.

Alternatively, you can perform a wire transfer directly into your account in order to add funds.



Bento Transfer

Use your online banking credentials for instant verification, or manually verify your bank account with micro deposits.

\$10,000 transfer/day limit

[Link Your Bank](#)



Wire Transfer

Initiate a wire transfer to your Bento account from your bank. Funds available same or next business day.

No transfer amount limit

[View Instructions](#)



Bank Transfer

Initiate a bank transfer to your Bento account from your bank. Funds available in 2 to 3 business days.

No transfer amount limit

[View Instructions](#)