

MeetMe@Citi Appointment Request



Thank you for your interest in scheduling an appointment with a Citi Personal Banker. The below form can be used to request a video-conference or phone appointment. Once you have completed the form, please email it to meetme@citi.com. A Personal Banker will be in touch to confirm the details of the appointment and to provide information on how to launch the phone or video conference at the time of your appointment. **Same day appointments can be requested until noon ET and will be granted based on banker availability.**

If you would like an in-person appointment, please DO NOT use the below form. All in-person appointments can be scheduled using the appointment scheduling [portal](#).

1. Personal Information

Full Name: _____

Primary Phone Number: _____ Last 4 digits of Debit Card _____

2. Purpose of Appointment

Using the drop down below, please identify the primary purpose of your appointment.

Please add any additional details here:

How would you like to connect? Video Conference Phone

3. Preferred Meeting Times

Appointments can be scheduled between 5:15 p.m. and 8:45 p.m. ET Monday–Thursday. Below, please rank the time slots that you prefer, they will be assigned first come first serve. Be sure to use the first row to indicate if the times are for the upcoming week, the following week, or both.

Please keep the following in mind:

- Assume “upcoming week” refers to the next 7 days and that “following week” refers to the following 7 days.
- If you would like a same-day appointment, select “upcoming week” and indicate available times. Same-day appointments will only be granted if a form is submitted prior to noon ET on the day of the request.

	Monday	Tuesday	Wednesday	Thursday
Times below are good for: this week, next week, both?				
5:15 p.m. – 5:45 p.m. ET				
6:00 p.m. – 6:30 p.m. ET				
6:45 p.m. – 7:15 p.m. ET				
7:30 p.m. – 8:00 p.m. ET				
8:15 p.m. – 8:45 p.m. ET				

After completing, save this form as a PDF and send as an email attachment to meetme@citi.com. You can expect an email response by noon the following business day. Same day appointments will be confirmed no later than 3p.m. ET on the day of the appointment. You will receive additional details on who you will be meeting with and how to access the phone or video conference session once your appointment has been scheduled.