

## Account Card

MEMBER APPLICATION AND OWNERSHIP INFORMATION		Member No:
<b>Member/Owner:</b>		
Street:	SSN/TIN:	
City/State/Zip:	Driver's Lic. No:	
Home Phone: <input type="checkbox"/> Listed <input type="checkbox"/> Unlisted	Date of Birth:	
Work Phone:	Password:	
E-mail:	Membership Eligibility:	
Employer:		
ACCOUNT OWNERSHIP		
Designate the ownership of the accounts and responsibility for the services requested.		
<input type="checkbox"/> Individual <input type="checkbox"/> Joint Account with Rights of Survivorship <input type="checkbox"/> Joint Account without Rights of Survivorship		
<b>Joint Owner:</b>		SSN/TIN:
Street:		Driver's Lic. No:
City/State/Zip:		Date of Birth:
Home Phone: <input type="checkbox"/> Listed <input type="checkbox"/> Unlisted		Password:
Work Phone:		E-mail:
<b>Joint Owner:</b>		SSN/TIN:
Street:		Driver's Lic. No:
City/State/Zip:		Date of Birth:
Home Phone: <input type="checkbox"/> Listed <input type="checkbox"/> Unlisted		Password:
Work Phone:		E-mail:
<b>Joint Owner:</b>		SSN/TIN:
Street:		Driver's Lic. No:
City/State/Zip:		Date of Birth:
Home Phone: <input type="checkbox"/> Listed <input type="checkbox"/> Unlisted		Password:
Work Phone:		E-mail:
ACCOUNT DESIGNATIONS		
<input type="checkbox"/> Payable on Death (POD)/Trust Account <input type="checkbox"/> All Accounts <input type="checkbox"/> Designate Specific Accounts		
Beneficiary/POD Payee: _____		Beneficiary/POD Payee: _____
Street: _____		Street: _____
City/State/Zip: _____		City/State/Zip: _____
<input type="checkbox"/> UTMA _____ (as custodian for _____ (minor) under the _____ Uniform Transfers to Minors Act.) Minor's SSN/TIN: _____		
<input type="checkbox"/> Agency    Print Name of Agent: _____  Signature: _____ Date: _____		
<input type="checkbox"/> All Accounts <input type="checkbox"/> Designate Specific Accounts		
<input type="checkbox"/> Other: _____ <input type="checkbox"/> See Account Authorization Card		
ACCOUNT TYPE		
All of the terms, conditions, form of account ownership, account selection and other information indicated on this Card apply to all of the accounts listed unless the Credit Union is notified in writing of a change.		
<input type="checkbox"/> Share/Savings: _____ Suffix		<input type="checkbox"/> Money Market: _____ Suffix
<input type="checkbox"/> Share Draft/Checking: _____		<input type="checkbox"/> HSA: _____
<input type="checkbox"/> Share Certificate/Certificate: _____		<input type="checkbox"/> Other: _____
The account number for each of the accounts listed consists of the suffix added to the end of the Member Number listed in the "MEMBER APPLICATION AND OWNERSHIP INFORMATION" section. If this Card applies to more than one account of the same type, more than one suffix will be listed for that account type.		
ACCOUNT SERVICES		
<input type="checkbox"/> Payroll Deduction/Direct Deposit:		
<input type="checkbox"/> Audio Response:		
<input type="checkbox"/> Overdraft Protection (Indicate transfer priority.):		
<input type="checkbox"/> ATM Card:		<input type="checkbox"/> Debit Card:
<input type="checkbox"/> PC Access/Internet Banking:		
<input type="checkbox"/> Other:		

# TIN CERTIFICATION AND BACKUP WITHHOLDING INFORMATION

**Under penalties of perjury, I certify that:**

- (1) The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued), and
- (2) I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
- (3) I am a U.S. citizen or other U.S. person. For federal tax purposes, you are considered a U.S. person if you are: an individual who is a U.S. citizen or U.S. resident alien; a partnership, corporation, company, or association created or organized in the United States or under the laws of the United States; an estate (other than a foreign estate); or a domestic trust (as defined in Regulations section 301.7701-7).
- (4) The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification Instructions.** Cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. Complete a W-8 BEN if you are not a U.S. person. If a W-8 BEN is completed, your signature does not serve to certify this section.

Exempt payee code (if any) \_\_\_\_\_

Exemption from FATCA reporting code (if any) \_\_\_\_\_

## AUTHORIZATION

By signing below, I/we agree to the terms and conditions of the Membership and Account Agreement, Truth-in-Savings Disclosure, Funds Availability Policy Disclosure, if applicable, and to any amendment the Credit Union makes from time to time which are incorporated herein. I/We acknowledge receipt of a copy of the agreements and disclosures applicable to the accounts and services requested herein. If an access card or EFT service is requested and provided, I/we agree to the terms of and acknowledge receipt of the Electronic Fund Transfers Agreement and Disclosure. **The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.**

Signature	Date
X	

Signature	Date
X	

Signature	Date
X	

Signature	Date
X	

## FOR CREDIT UNION USE ONLY

☐ See Account Change Card

☐ See Insurance Beneficiary Card

Date of Membership: \_\_\_\_\_

Opened/App'd by: \_\_\_\_\_

Member Verification: \_\_\_\_\_

☐ Credit Report

☐ Check Verify

☐ PIN Request

☐ Access Card

☐ Audio Response

☐ PC Access/Internet Banking