

### ACCOUNT SERVICES

- Payroll Deduction/Direct Deposit: \_\_\_\_\_  ATM Card: \_\_\_\_\_
- Overdraft Protection (Indicate transfer priority.): \_\_\_\_\_  Debit Card: \_\_\_\_\_
- \_\_\_\_\_  Audio Response: \_\_\_\_\_
- PC Access/Internet Banking: \_\_\_\_\_  Other: \_\_\_\_\_

### ACCOUNT OWNERSHIP

Designate the ownership of the accounts and responsibility for the services requested.

- Individual** *OR*  **Joint Account with Rights of Survivorship**  **Joint Account without Rights of Survivorship**

**Joint Owner:** \_\_\_\_\_

Street: \_\_\_\_\_ SSN/TIN: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_ Driver's Lic. No: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

- Listed  Unlisted

Password: \_\_\_\_\_

Work Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

**Joint Owner:** \_\_\_\_\_

Street: \_\_\_\_\_ SSN/TIN: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_ Driver's Lic. No: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

- Listed  Unlisted

Password: \_\_\_\_\_

Work Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

### ACCOUNT DESIGNATIONS

- Payable on Death (POD)/Trust Account**
- All Accounts  Designate Specific Accounts: \_\_\_\_\_

Beneficiary/POD Payee: \_\_\_\_\_ Beneficiary/POD Payee: \_\_\_\_\_

Street: \_\_\_\_\_ Street: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_ City/State/Zip: \_\_\_\_\_

- UTMA/UGMA** (as custodian for \_\_\_\_\_ (minor) under the Uniform Transfers/Gifts to Minors Act) Minor's SSN/TIN: \_\_\_\_\_

- Agency** Print Name of Agent: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

- All Accounts  Designate Specific Accounts: \_\_\_\_\_

- Other:** \_\_\_\_\_  See Account Authorization Card

### 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