



You certify that you are eligible for membership on the basis that you: ☐ Reside ☐ Work ☐ Volunteer ☐ Attend School ☐ Worship in Albany, Columbia, Dutchess, Greene, Orange, Putnam, Rensselaer, Rockland, Saratoga, Schenectady, Sullivan, Ulster or Westchester County. You are an Immediate Family Household member of: \_\_\_\_\_ who is a current member. Relationship: \_\_\_\_\_

### Primary Owner Identification

Type: \_\_\_\_\_ Issued By: \_\_\_\_\_ ID# \_\_\_\_\_ Date Issued: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

### Certificate Details

Amount: \_\_\_\_\_ Term: \_\_\_\_\_ Dividend Disbursement ☐ Credit to Certificate ☐ Credit to Share ID: \_\_\_\_\_

### Primary Account Owner

First Name	Last Name	MI	Date of Birth	Social Security Number	Business Phone		
Residential Address			City	State	ZIP	Home Phone	Mobile
Mailing Address			Pass code		Email		

☐ Overdraft Coverage from Primary Savings ☐ No Overdraft Coverage

☐ You certify that you have the necessary equipment and ability to access records electronically.

You DO NOT authorize Hudson Valley Credit Union from time to time and for any lawful reason including to advise you of services or products that may benefit you, make telephone calls and/or send text messages to you at any telephone number associated with your account, including wireless telephone numbers that could result in charges to you as dictated by your service provider. The manner in which these calls or text messages are made to you include, but are not limited to, the use of prerecorded/artificial voice messages and/or automatic telephone dialing system. Hudson Valley Credit Union may also send e-mails to you at any email address you provide us or use other electronic means of communication to the extent permitted by law. In other words, if you do not check this box, you expressly AUTHORIZE Hudson Valley Credit Union to contact you via any method described here. Checking this box will NOT impact your membership approval process. Please note this written authorization is valid until you expressly revoke it. Consent may be revoked at any time and by any reasonable means, but the best way to reach us is via 845.463.3011 or www.hvcu.org.

☐ You DO NOT authorize Hudson Valley Credit Union to use your credit report and credit data for the purpose of cross-selling and evaluating your eligibility for various loans, products and services, each time you open an account or make an application to Hudson Valley Credit Union for a loan, product or service. In other words, if you do not check this box, you expressly AUTHORIZE Hudson Valley Credit Union to use your credit report and credit data for the purpose of cross-selling and evaluating your eligibility for various loans, products and services, each time you open an account or make an application to Hudson Valley Credit Union for a loan, product or service. Checking this box will NOT impact your membership approval process or evaluation for the instant product or service for which you have applied or chosen. Please note this written authorization is valid until you expressly revoke it. Consent may be revoked at any time and by any reasonable means, but the best way to reach us is via 845.463.3011 or www.hvcu.org

**IMPORTANT INFORMATION ABOUT THE PROCEDURES FOR OPENING A NEW 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 an account.

**What this means for you:** When you open an account, we will ask you for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents.

By signing or otherwise authenticating, I/we agree to the terms and conditions of the Truth In Savings Disclosure and Account Agreement, Fee Schedule, Account Rate Information, Privacy Notice, Overdraft Notice, and Funds Availability Policy Disclosure, if applicable. If an access card or EFT service is requested and provided, I/we agree to the terms of the Electronic Fund Transfers Agreement and Disclosure. I/We acknowledge receipt of the agreements and disclosures applicable to the accounts and services requested herein, and to any amendment the Credit Union makes from time to time which are incorporated herein, and which will be posted on the credit union's web site for immediate review. My/our continuing to use credit union services after the posting of such amendments constitutes my/our acceptance of the amendment[s] and I/we understand our responsibility to monitor for amendments and changes on a regular basis.

**Sharing Information**

☐ If this box is left unchecked, information relating to your account(s) may be shared with Hudson Valley Credit Union's affiliates. This application serves as the Master Membership Account Application or Supplemental Application, and controls all subsequent accounts opened under this member number, except for Trust Accounts, and is a continuing authorization to open any other account for you on your verbal request and deposit of funds.

<b>Taxpayer Identification Number (TIN)</b> Enter your TIN in the appropriate box. For individuals, this is your Social Security Number (SSN). For most entities, it is your Employer Identification Number (EIN). If you do not have a number, refer to the instructions outlined on the Internal Revenue Service's Website: <a href="http://www.irs.gov">www.irs.gov</a>	<b>SSN/TIN Number:</b>
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**TIN Certification**

You certify under penalties of perjury that the following is true: (1) The number shown on this form is your correct taxpayer identification, and (2) you are not subject to backup withholding. You agree to check the box if you have been notified by the IRS that you are currently subject to backup withholding because of underreporting interest or dividends on your tax return. (3) You are 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 you are exempt from FATCA reporting is correct. Exempt payee code (if any) \_\_\_\_\_ exemption from FATCA reporting code (if any) \_\_\_\_\_. **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 and TIN Certification (with Title, if applicable)

Date