



Member Number: _____

Share ID: _____

Share ID: _____

ADD JOINT OWNER INSTRUCTIONS

IMPORTANT INFORMATION ABOUT THE PROCEDURES FOR ADDING A JOINT OWNER TO AN 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 will also ask to see your driver's license or other identifying documents.

Joint Owner Identification

ID Type: _____ Document ID#: _____ Issued By: _____
(example: Driver's License, Passport etc.) (example: New York State, U.S. Gov't, etc.)
Date Issued: _____ Expiration Date: _____ Mobile Phone Number: _____

First Name Last Name Middle Initial Date of Birth SocialSecurityNumber Business Phone (if applicable)

Residential Address City State ZIP Home Phone

Mailing Address Passcode* E-mail
*to be used for over-the-phone identification

Joint Owner Identification

ID Type: _____ Document ID#: _____ Issued By: _____
(example: Driver's License, Passport etc.) (example: New York State, U.S. Gov't, etc.)
Date Issued: _____ Expiration Date: _____ Mobile Phone Number: _____

First Name Last Name MI Date of Birth SocialSecurityNumber Business Phone (if applicable)

Residential Address City State ZIP Home Phone

Mailing Address Passcode* E-mail
*to be used for over-the-phone identification

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.

Primary/Member Signature Date

Joint Owner's Signature Date

Joint Owner's Signature Date