



**ACCOUNT SERVICES**

- Payroll Deductions/Direct Deposit \_\_\_\_\_  ATM Card \_\_\_\_\_
- Overdraft Protection (indicate transfer priority below) \_\_\_\_\_  Debit Card \_\_\_\_\_
- \_\_\_\_\_  Audio Response \_\_\_\_\_
- PC Access/Internet Banking \_\_\_\_\_  Other \_\_\_\_\_

**ACCOUNT OWNERSHIP**

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

- Individual       Joint Account with Survivorship       Joint Account with Survivorship

**Joint Owner** \_\_\_\_\_ SSN/TIN \_\_\_\_\_  
 Street \_\_\_\_\_ Driver's Lic. No. \_\_\_\_\_  
 City/State/Zip \_\_\_\_\_ Date of Birth \_\_\_\_\_  
 Home Phone \_\_\_\_\_ Password \_\_\_\_\_  
                                   Listed     Unlisted                                    Employment \_\_\_\_\_  
 Work Phone \_\_\_\_\_ E-mail \_\_\_\_\_

**Joint Owner** \_\_\_\_\_ SSN/TIN \_\_\_\_\_  
 Street \_\_\_\_\_ Driver's Lic. No. \_\_\_\_\_  
 City/State/Zip \_\_\_\_\_ Date of Birth \_\_\_\_\_  
 Home Phone \_\_\_\_\_ Password \_\_\_\_\_  
                                   Listed     Unlisted                                    Employment \_\_\_\_\_  
 Work Phone \_\_\_\_\_ E-mail \_\_\_\_\_

**ACCOUNT DESIGNATIONS**

- Payable on Death (POD) Trust Account**       All accounts       Designate specific account(s) \_\_\_\_\_

Beneficiary/POD Payee \_\_\_\_\_ Beneficiary/POD Payee \_\_\_\_\_  
 Street \_\_\_\_\_ Street \_\_\_\_\_  
 City/State/Zip \_\_\_\_\_ City/State/Zip \_\_\_\_\_

- Agency**      Print Name of Agent \_\_\_\_\_  
                                  Signature \_\_\_\_\_ (date) \_\_\_\_\_  
                                   All accounts      Designate specific account(s) \_\_\_\_\_

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

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

**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