

Account Ownership

Joint account holder #1

SSN/TIN

Relationship to member

Address

Driver's license/I.D. #

Date of birth

Phone – home ()

Phone – work ()

Mother's maiden name

Joint account holder #2

SSN/TIN

Relationship to member

Address

Driver's license/I.D. #

Date of birth

Phone – home ()

Phone – work ()

Mother's maiden name

Account Designations

Payable on Death (POD)

Beneficiary #1

SSN/TIN

Relationship to member

% of distribution

Address

Beneficiary #2

SSN/TIN

Relationship to member

% of distribution

Address

UTTMA as custodian for

(minor) under the Uniform Transfer To Minors Act

Minor's SSN/TIN

For Credit Union Use Only

Date of membership

Opened by

Identification verified