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## ACCOUNT CHANGE FORM

Member # \_\_\_\_\_

Primary Owner \_\_\_\_\_ Joint Owner \_\_\_\_\_

- NAME CHANGE:** attach copy of legal document such as marriage certificate, final dissolution of marriage, etc.) *(Please select one)*      **Primary Owner**      **Joint Owner**

Current Name \_\_\_\_\_  
New Name \_\_\_\_\_

**ADDRESS CHANGE: Submit valid ID.    In Person    Remotely (Via Fax/E-Mail- Docusign)**

Physical Address \_\_\_\_\_  
Mailing Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_  
Cell Phone \_\_\_\_\_ E-Mail \_\_\_\_\_

**REMOVE FLAG 24**

**NEW SERVICES REQUESTED. Check all that apply.**

- Checking Account\*\*    # \_\_\_\_\_     ATM Card  
 Visa Debit Card     "My" Club Account     Vacation Club Account  
Other \_\_\_\_\_

\*\* If adding a Checking Account, **all parties must sign**. Optional ID Theft Service (\$2.50 per mo.)

- Opt in to Checking with ID Theft Service     Opt out of Checking with ID Theft Service

For your convenience, our checking account offers Courtesy Pay for checks, ATM/debit card transactions, and ACH transactions. If member wishes to opt-in to our Courtesy Pay Program for checks, ATM/Debit card transactions, and ACH transactions, he/she must sign the initial disclosure.

- Check this box if you wish to opt out of the Courtesy Pay Program

**ADD JOINT OWNER (Joint owner is joint on all accounts, except CD and IRA) All parties must sign.**

Name \_\_\_\_\_ SSN/TIN \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_  
Cell Phone \_\_\_\_\_ E-Mail \_\_\_\_\_  
Date of Birth \_\_\_\_\_ Place of Birth \_\_\_\_\_ MMN \_\_\_\_\_  
Relationship \_\_\_\_\_ Occupation \_\_\_\_\_

**FORWARD COMPLETED FORM TO MEMBER SERVICE MANAGER AT MAIN OFFICE!!**

**Credit Union Use:**

Date Received \_\_\_\_\_ by \_\_\_\_\_ Change Completed on \_\_\_\_\_ by \_\_\_\_\_

