



Membership Account Subsequent Action Request and Authorization

Member Account Number

Complete an Account Subsequent Action Request and Authorization Form for each member number that will have information changed.

Primary Member's Name
Request by: Primary or Joint Name SSN
Driver's License # State Date Issued Date Expires

Address Change
Physical Address
Mailing Address
Telephone Number Email Address

Subsequent Account Opening

- Please check all specific types of products to be opened.
Savings [RS] (\$25 minimum)
Cash Card
Request Cash Card Pin
Super 60 [SS] (\$600 minimum to open)
Request Visa Debit Card Pin
Money Market Account [MM] (\$500 minimum to open)
Payment Transfer [PT]
Custodian Account [CA]
Savings Quest [KS] (\$5 minimum)
MyFi Savings [TS] (\$5 minimum)
Christmas Club [CC] (check) (\$25 minimum)
Christmas Club Rollover [CR] (\$25 minimum)
Christmas Club Transfer [CT] Member Number Account Type Sub
Vacation Club [VC] (\$25 minimum)
Term Share Certificate
5 Month [B1] (\$500 minimum)
6 Month [C1] (\$2,000 minimum)
12 Month [C2] (\$2,000 minimum)
18 Month [C3] (\$2,000 minimum)
24 Month [C4] (\$2,000 minimum)
36 Month [C5] (\$2,000 minimum)
60 Month [C7] (\$2,000 minimum)
6 Month Jumbo [CJ] (\$50,000 minimum)
Individual Retirement Account (IRA forms required, open for primary only)
Type of IRA Traditional Roth Coverdell Educational
Type of Product Shares Certificate (Term)
Payable on Death/Trust (additional forms required and approval needed)

I acknowledge that: I have received disclosures regarding Funds Availability, Truth-In-Savings, and Electronic Fund Transfers, or I understand that I will receive such disclosure writing 20 days after my account is opened.

Name Change

\*\*\*Name on account MUST match the name on the Social Security Card or ITIN Card\*\*\*

Old Name: New Name:
Verification Method (please provide copy) Driver's License Social Security Card

Signature and Authorization

By signing below, the undersigned acknowledges that such account(s) shall follow the same ownership and Payable-On-Death designation as the existing Membership Application.

Signature Date

Credit Union Use Only

Teller Number Updated by Date Branch
Teller Number Audited by Date