Add or Remove Joint Account Owner(s)

Primary Account Owner:_____ Account Number:_____

Complete the applicable information below, specific to whether you are adding or removing a joint account owner. Adding joint account owners to or removing joint account owners from shares does not apply to the ownership of loans or IRAs. **All new and existing account owners are required to sign below to process the request.**

⏩ ADD a Joint Account Owner

Joint Account Owner Name _____

Physical Address/City/State/Zip _____

Social Security #_____ Date of Birth _____

Valid ID # _____ ID Type _____

Issue Date _____ Exp. Date_____

***IMPORTANT: A copy of the photo ID referenced above is required to add the joint account owner.**

Occupation _____ Employer _____

Email Address _____ Mother's Maiden Name _____

Primary Phone ( ) _____ Choose One: ❑ Mobile ❑ Home ❑ Work

Secondary Phone ( ) _____ Choose One: ❑ Mobile ❑ Home ❑ Work

Would you like to **order a Visa® Debit Card** for the new joint member? ❑ Yes ❑ No

Should **new checks be ordered** to include the new joint member? ❑ Yes ❑ No

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⏩ REMOVE a Joint Account Owner

Name of Joint Account Owner Being Removed:_____

Things to consider when REMOVING a joint member:

- A joint account owner may not be removed if there is a negative balance; the account must have at least a zero balance.
- Cancel/update any automatic transactions in the joint account owner's name.
- Shred any checks with the joint account owner's name; contact us to order new checks.
- If the joint account owner is also joint on any loans on this account or another, contact our Lending Dept. to change loan ownership (a new loan application may be required.)
- Update any login/password info that the account owner may have access to (this applies to Mobile & Home Banking and Bill Payer.)

ALL account owners must sign below to acknowledge and agree to the terms and conditions:

1. Contained in this and any previously executed change form, membership application or enrollment forms;
2. Of the Membership and Account Agreements and Account Disclosure, all as amended to date;
3. That issuance of each Debit Card or other access device selected in the "Add or Remove Joint Account Owner" section is specifically requested.

_____ _____

Primary Account Owner Signature Date

_____ _____

Joint Account Owner Signature Date

_____ _____

Joint Account Owner Signature Date