



United Methodist FEDERAL CREDIT UNION

9040 Benson Ave. | Montclair, CA 91763 (800) 245-0433 | umfcu.org | memberservices@umfcu.org

Additional Services Request Form

Member Name (Print) \_\_\_\_\_ Account No. \_\_\_\_\_

I hereby make application for the account(s) indicated below and agree that the account(s) is/are subject to the terms of the Invitation to Join/Signature Card. I understand and agree that the account(s) indicated below are owned by any joint owner(s) set forth on the Invitation to Join/Signature Card. I agree to conform to your bylaws as well as all applicable terms and conditions set forth in the Truth in Savings Disclosure, the Certificate Account Agreement and Disclosure (if applicable), and Electronic Services Disclosure and Agreement (receipt of which is hereby acknowledged and which is incorporated by the reference).

- Share Draft (Checking) Account (\$25 minimum deposit) ..... \$ \_\_\_\_\_ (Must complete "Overdraft Options" section below)
Christmas Club (no minimum to deposit) ..... \$ \_\_\_\_\_
Money Market ..... \$ \_\_\_\_\_
Youth Share Accounts (\$5 minimum to deposit)..... \$ \_\_\_\_\_
ATM Card Additional Card for Joint Owner Debit Card Additional Card for Joint Owner (must have Checking Account)
Certificate Term \_\_\_\_\_

SHAREDRAFT/OVERDRAFT OPTIONS

Overdraft can be covered in two different ways or combinations thereof. They are: 1) A transfer from my savings account, with not more than a total of six transfers in any calendar month, regardless of source of transfer, or 2) An advance from my Line of Credit, upon approval of credit and subject to terms and conditions of that account, up to my credit limit. If this option is selected loan application must be completed (check only one box).

- SAVINGS ONLY LINE OF CREDIT ONLY NO OVERDRAFT

ADDING A JOINT OWNER

If you did not originally have a joint owner and you wish to add a Joint Owner to all your account(s) please complete the information below. Both the primary member and new joint owner must sign at bottom.

Important Information About Procedures for Opening a New Account: To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify and record information that identifies each person who opens an account.

What this means for me: When I open an account, you will ask for my name, address, date of birth, and other information that will allow you to identify me. You may also ask to see my driver's license or other identifying documents. (Include I.D. copy)

Joint Owner Name Date of Birth Driver's License No. Mother's Maiden Name
Home Address Home Phone Work Phone
E-mail Address Social Security No. Employer Occupation

ADDING/CHANGING A BENEFICIARY

If you as primary owner would like to add/change a beneficiary, please complete the information below and sign below where indicated.

BENEFICIARY(IES) in the event of my death, or if there is more than one owner of this account, in the event of death of all the owners, the owner(s) hereby designate as my/our beneficiary(ies) to receive all sums in my/our account(s).

Name Add Delete Relationship Phone No.
Address Social Security No. Credit Union Account No. (if applicable)
E-mail Address
Name Add Delete Relationship Phone No.
Address Social Security No. Credit Union Account No. (if applicable)

X Primary Owner Signature Date X New Joint Owner Signature (If Applicable) Date

CREDIT UNION USE ONLY Table with columns: Officer Signature, Date, OPENED/ORDERED BY, REGULAR SHARE, ONLINE BANKING, SHARE/DRAFT CHECKING, CHEXSYSTEMS, OFAC VERIFICATION, INITIAL ORDER, CHRISTMAS CLUB, YOUTH SHARE, ATM DEBIT CARD, SECOND CARD, LOC \$