

# CHANGE/ADD/DELETE AUTHORIZATION ACCOUNT OWNERSHIP



Please print all information legibly and complete only the section(s) that apply to you.

**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 you:** When you open an Account, we will ask for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see (and retain a copy of) your driver's license, passport or other identifying documents that will help us identify you. If we have difficulty verifying any Account holder's identity, we may not be able to open an Account or establish a relationship, or we may have to block or close the Account.

Primary Member Name on Account

Advancial Membership Number

## Account Ownership

Complete this section to change the type of Account ownership for the Account number indicated above. Select ONE option. The type of ownership selected, including any Payable on Death (P.O.D.) designation, will apply to your Account and any subaccounts opened now or in the future under the same membership number (except for IRA and loan accounts). The type of ownership selected may determine how your property passes on your death. For some ownership types below, your will may not control the disposition of funds held in your Account, including any subaccounts.

### Individual Accounts

- Single Party Account with P.O.D.**  
On the death of the Account Owner, ownership of the Account and any subaccounts passes to the surviving P.O.D. Beneficiaries in equal shares. The Account is not part of your estate. Complete Section 2 as applicable.
  
- Single Party Account without P.O.D.**  
On the death of the Account Owner, ownership of the accounts and any subaccounts passes as part of your estate under your will or by intestacy.

### Joint Accounts

- Multiple Party Account with Right of Survivorship and no P.O.D.**  
On the death of an owner, the owner's ownership of the Account and any subaccounts passes to the surviving owners. Complete Section 2 as applicable.
  
- Multiple Party Account with Right of Survivorship and P.O.D.**  
On the death of an owner, the owner's ownership of the Account and any subaccounts passes to the surviving owners. On the death of the last surviving Account owner, ownership of the Account and any subaccounts passes to the surviving P.O.D. Beneficiaries in equal shares. Complete Section 2 and Section 3 as applicable.
  
- Multiple Party Account without Right of Survivorship**  
On the death of an owner, the owner's ownership of the Account and any subaccounts passes as part of the owner's estate under the owner's will or by intestacy. A P.O.D. designation may not be made on a Multiple Party Account without Right of Survivorship. Complete Section 3 as applicable.

## 2 Payable on Death Beneficiary(ies)

Complete this section to add or remove P.O.D. beneficiaries on your Account. All fields must be completed for each beneficiary you designate. Beneficiaries all share equally. All Account Owners must sign this Authorization form to ensure your designations are valid. If your Account does not currently have P.O.D. beneficiaries, you must update your Account Ownership type in Section 2 of this Authorization before adding P.O.D. beneficiaries.

Beneficiary Legal Name (First/Given Name, Middle Name, Last/Surname/Family Name)

SSN/Tax ID Number  Beneficiary has no Social Security/Tax ID Number

Date of Birth (MM/DD/YYYY) Relationship to Member

Address

City State Zip Code Country

Mobile/Primary Phone Number Email Address

Beneficiary Legal Name (First/Given Name, Middle Name, Last/Surname/Family Name)

SSN/Tax ID Number  Beneficiary has no Social Security/Tax ID Number

Date of Birth (MM/DD/YYYY) Relationship to Member

Address

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Please print all information legibly and complete only the section(s) that apply to you.

Duplicate this page for each additional joint owner you want to add to this account and attach the completed signed copy to this Authorization form.

## 3 Add Joint Account Owner

Complete this section to add a Joint Account Owner(s) to the above referenced Account Number. The Joint Account Owner(s) will have ownership Account privileges and access to the Account including any subaccounts opened now or in the future except for IRA Accounts and loan account on which the Joint Account Owner is not a borrower. A copy of a valid government-issued photo identification such as a driver's license, passport or ID card of each individual listed below is required to process this request.

### A. Personal Information

Full Legal Name (Must match government issued ID): *First/Given Name, Middle Name, Last/Surname/Family Name*

Nickname (Preferred Name)

Date of Birth (MM/DD/YYYY)

Social Security/Tax ID Number

I do not have a Social Security/Tax ID Number

Citizenship:  U.S. Citizen  Permanent Resident Alien  Nonresident Alien

Country of Citizenship if not U.S. Citizen

### B. Contact Information

To expedite the processing of your application, please provide proof of residency if your residential/permanent address differs from the address on your photo ID.

Residential/Permanent Street Address (*no P.O. boxes*)

City

State

Zip Code

Country

Mobile/Primary Phone Number

Alternate Phone Number

Preferred Email Address

### C. Employer Information

Employer

Occupation/Job Title

Work Phone Number

### D. Photo Identification Information

Remember to include a clear COLOR PHOTOCOPY of your valid, government-issued photo ID with your application. Non-U.S. citizens must provide two forms of ID including a valid passport and one additional form of valid, government-issued photo ID.

ID Type:  Driver's License  Passport  Other: \_\_\_\_\_

Identification (ID) Number

Expiration Date (MM/DD/YYYY)

Issuing State/Province

Issuing Country

Additional ID Type (Non-U.S. Citizens Only):  Driver's License  Other: \_\_\_\_\_

Identification (ID) Number

Expiration Date (MM/DD/YYYY)

Issuing State/Province

Issuing Country

