

# CHANGE/ADD/DELETE AUTHORIZATION ACCOUNT INFORMATION CHANGES

Please print all information legibly.



Name \_\_\_\_\_ Account Number \_\_\_\_\_

## Change of Contact Information Primary Member Joint Account Owner Both

Choose One:  Permanent Residence  Mailing Address (Account correspondence is mailed only to the address on record for the Primary Member.)

Address (Do not use P.O. box for Permanent Residence) \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_ Country \_\_\_\_\_

Mobile/Primary Phone Number \_\_\_\_\_ Alternate Phone Number \_\_\_\_\_ Work Phone Number \_\_\_\_\_

Preferred Email Address (to receive notifications and information regarding your Account) \_\_\_\_\_

## 2 Change Name on Account or Update Citizenship Status (Not for use with Trust Accounts) Primary Member Joint Account Owner

A photocopy of the official court documentation is required in order to process a name change.

Original Name \_\_\_\_\_ New Name (Full Legal Name) \_\_\_\_\_

Reason for name change \_\_\_\_\_

My current citizenship status is:  U.S. Citizen  Permanent Resident Alien  Nonresident Alien

## 3 Taxpayer Identification Number and Certification (Not for use with Trust Accounts)

Dividends earned on accounts may be considered taxable income and are subject to reporting to the U.S. Internal Revenue Service. Advancial uses the Substitute W-9 Form below to certify your taxpayer status. Dividend-bearing accounts are available only to individuals who have a valid taxpayer identification number and are eligible to certify their taxpayer status on the Substitute W-9 Form below. For tax reporting purposes, if you are not a U.S. citizen or other U.S. person, or if you are unsure of your taxable status, we recommend consulting a qualified professional before completing this section.

Full Legal Name (First, Middle, Last) Name must match government-issued photo ID \_\_\_\_\_ SSN or ITIN \_\_\_\_\_ Country of Citizenship \_\_\_\_\_

By signing below and under penalties of perjury, you certify that (1) the number shown on this form is your correct taxpayer identification number (or you are waiting for a number to be issued to you), and (2) you are not subject to backup withholding because (a) you are exempt from backup withholding, or (b) you have not been notified by the Internal Revenue Service (IRS) that you are subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified you that you are no longer subject to backup withholding, (3) you are a U.S. citizen or other U.S. person (including a U.S. resident alien), and (4) the Foreign Account Tax Compliance Act (FATCA) code entered on this form (if any) indicating that you are exempt from FATCA reporting is correct.

**Certification Instructions:** Check the first box below if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. Check the second box below and complete IRS Form W-8BEN if you are not a U.S. citizen or other U.S. person (including a nonresident alien). Item 4 above does not apply.

**DO NOT CHECK UNLESS APPLICABLE. These selections do not apply to most persons. If you have questions, please contact us.**

I am subject to backup withholding  I am not a U.S. citizen or other U.S. person (including a nonresident alien)

## 4 Signatures

By signing below, I/we agree that the changes on this Authorization amend any previously signed Authorization and Membership and Account Application for the Account. Each person signing below ("you") certifies that the information provided in this application is accurate and complete, and you agree to promptly inform the Credit Union within 30 days of any changes to this information. In addition, you authorize the Credit Union to check your credit history, to request and use reports regarding the same, and to answer questions about its credit experience with you. You also acknowledge that the Credit Union reserves the right to limit services based on information provided by credit reporting agencies. The Credit Union may additionally restrict or deny services, including without limitation, electronic fund transfers services such as debit/ATM card and online Account access, if you become delinquent on an obligation to us, cause us a loss, or are abusive in the conduct of your affairs with the Credit Union. The Primary Member and the Joint Account Owner (if any), acknowledges receipt of and agrees to be bound by the Advancial Federal Credit Union Membership and Account Agreement, including without limitation the Funds Availability Policy and the Account Services and Fee Schedule. You also agree to be bound by any other instrument or agreement received or executed in connection with the opening or maintenance of any Advancial Federal Credit Union Account or service, together with all of the Credit Union's policies, procedures, rules, and bylaws as amended from time to time. If you have designated your Account to be opened as a Multiple Party Account with Right of Survivorship, then on the death of one owner to the Account, all sums in the Account on the date of death vest in and belong to each surviving owner as their separate property and estate. **The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.**

Primary Member Signature \_\_\_\_\_ Printed Name \_\_\_\_\_ Date \_\_\_\_\_

Joint Account Owner Signature \_\_\_\_\_ Printed Name \_\_\_\_\_ Date \_\_\_\_\_