

Joint Owner Form - Addition/Removal
(Not to be used for Orgs, Trusts, Sweep, IRA and HSA accounts)



Primary Member Name \_\_\_\_\_ Member Number \_\_\_\_\_
PLEASE PRINT LOCATED ON STATEMENT (xxxxxx)
Existing Joint Owner Name (1): \_\_\_\_\_ Existing Joint Owner Name (2): \_\_\_\_\_
PLEASE PRINT PLEASE PRINT

New Joint Owner's (JO) Information
[ ] ADD a new JO [ ] REMOVE a JO
First Name: \_\_\_\_\_ Middle Name: \_\_\_\_\_ Last Name: \_\_\_\_\_
Street Address: \_\_\_\_\_
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_
Relationship to Member: \_\_\_\_\_ Driver's License Number: \_\_\_\_\_
State: \_\_\_\_\_ Issued Date: \_\_\_\_\_ Exp. Date: \_\_\_\_\_
Primary Phone Number: ( ) \_\_\_\_\_ Alternate Phone Number: ( ) \_\_\_\_\_
Primary Email Address: \_\_\_\_\_ Alternate Email Address: \_\_\_\_\_
New Joint Owner's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

ACCOUNT NUMBER(s)
(not member number)
Statements display full account numbers.
[ ] Select to adjust to all accounts under this Member Number

New Joint Owner's (JO) Information
[ ] ADD a new JO [ ] REMOVE a JO
First Name: \_\_\_\_\_ Middle Name: \_\_\_\_\_ Last Name: \_\_\_\_\_
Street Address: \_\_\_\_\_
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_
Relationship to Member: \_\_\_\_\_ Driver's License Number: \_\_\_\_\_
State: \_\_\_\_\_ Issued Date: \_\_\_\_\_ Exp. Date: \_\_\_\_\_
Primary Phone Number: ( ) \_\_\_\_\_ Alternate Phone Number: ( ) \_\_\_\_\_
Primary Email Address: \_\_\_\_\_ Alternate Email Address: \_\_\_\_\_
New Joint Owner's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

ACCOUNT NUMBER(s)
(not member number)
Statements display full account numbers.
[ ] Select to adjust to all accounts under this Member Number

New Joint Owner's (JO) Information
[ ] ADD a new JO [ ] REMOVE a JO
First Name: \_\_\_\_\_ Middle Name: \_\_\_\_\_ Last Name: \_\_\_\_\_
Street Address: \_\_\_\_\_
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_
Relationship to Member: \_\_\_\_\_ Driver's License Number: \_\_\_\_\_
State: \_\_\_\_\_ Issued Date: \_\_\_\_\_ Exp. Date: \_\_\_\_\_
Primary Phone Number: ( ) \_\_\_\_\_ Alternate Phone Number: ( ) \_\_\_\_\_
Primary Email Address: \_\_\_\_\_ Alternate Email Address: \_\_\_\_\_
New Joint Owner's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

ACCOUNT NUMBER(s)
(not member number)
Statements display full account numbers.
[ ] Select to adjust to all accounts under this Member Number

By signing below, I acknowledge and agree to the changes in account ownership as specified on this form. I understand that adding or removing a joint owner may affect access, rights, and responsibilities related to the account. All parties involved have consented to these changes.

Member Signature: \_\_\_\_\_ Date: \_\_\_\_\_
Existing Joint Signature (1): \_\_\_\_\_ Date: \_\_\_\_\_
Existing Joint Signature (2): \_\_\_\_\_ Date: \_\_\_\_\_

CREDIT UNION USE ONLY:
ChexSystems Qualifile (1) [ ] No Record [ ] Record
ChexSystems Qualifile (2) [ ] No Record [ ] Record
ChexSystems Qualifile (3) [ ] No Record [ ] Record
OFAC (1) [ ] No Match [ ] Match
OFAC (2) [ ] No Match [ ] Match
OFAC (3) [ ] No Match [ ] Match
Government ID Verified by \_\_\_\_\_
Government ID Verified by \_\_\_\_\_
Government ID Verified by \_\_\_\_\_