

# MEMBERSHIP/ACCOUNT ADDENDUM

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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, physical address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents. For Membership/Account Addendums received by mail/Internet, an Elements representative may contact you to verify the information supplied.

## Primary Member Information

First Name	MI	Last Name	
<input type="checkbox"/> Add Joint Owner <input type="checkbox"/> Name Change <input type="checkbox"/> Add Attorney Fact (Recertification Form Required) <input type="checkbox"/> Add Guardian <input type="checkbox"/> Add Representative Payee			

## Joint Owner / Attorney in Fact / Guardian / Representative Payee Information

First Name	MI	Last Name	Date of Birth	Social Security Number
Home Street Address (No P.O. Boxes)		City	State	Zip Code
Home Phone		Cell Phone	Work Phone	
Driver's License Number		Issuing State	Issue Date	Expiration Date
Occupation		Email Address (Home Preferred. Email address required for estates and online banking.)		
Phone Security Word (Select a word other than Mother's Maiden Name for use when calling Elements.)		Phone Security Word Hint (Provide a hint we use to remind you of your security word when calling Elements.)		
<input type="checkbox"/> Order a Visa Debit Card for Joint Owner				

**List Impacted Account Numbers or Choose All Accounts:** \_\_\_\_\_

All Accounts \_\_\_\_\_

## Name Change

Please provide a copy of government or legal documents (e.g. Court Order or Driver's License) showing the new name.

Old Name	New Name
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## TIN Certification & Backup Withholding Information

**Certification Instructions:** You must cross out item 2 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. Cross out Item 3 and complete a W-8 BEN if you are not a U.S. person or U.S. resident alien.

- Under penalties of perjury, I certify that:
- 1) The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
  - 2) I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
  - 3) I am a U.S. person (including U.S. resident alien); and
  - 4) The FACTA Code's entered on this form (if any) indicating that I am exempt from FACTA reporting is correct.

Authorization: I/we declare that the information provided is true and agree to notify Elements of any material change thereto. By signing, I/we agree to the terms and conditions of the Membership Agreement and Deposit Account Terms & Conditions, Fee Schedule and Deposit Rate Sheet as amended from time to time. I/we acknowledge receipt of a copy of the Membership Agreement and Deposit Account Terms & Conditions and disclosures. **The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.**

X \_\_\_\_\_  
 Primary Member Signature Date

X \_\_\_\_\_  
 Joint Owner/Attorney in Fact/Guardian/Representative Payee Signature Date

X \_\_\_\_\_  
 Existing Joint Owner Signature Date