ADDITIONAL SERVICES REQUEST

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BEYOND BANKING
PO BOX 8017
EL MONTE CA 91734
RizeCU.com • 800.866.6474

Additional Services

Please add the following services to my account:

- ☐ Joint owner(s)
- ☐ Name change
- ☐ Savings
  - ☐ Vacation Club - min deposit required
  - ☐ Holiday Club - min deposit required
  - ☐ Personalized Account - i.e., tax savings
- ☐ Certificate
- ☐ Money Market
- ☐ Checking
- ☐ Overdraft protection from:
  - ☐ Savings only
  - ☐ Savings, then line of credit
  - ☐ Line of credit, then savings
- ☐ Debit card
- ☐ Digital banking
- ☐ Loan – type _____

Credit Union only

Opened by / Operator # _____

- ☐ Chex Systems / OFAC / credit
- ☐ ID collected
- ☐ Account ID identified
- ☐ Debit card
- ☐ Ordered checks

Info verified by _____

on _____

Primary Member Name | Last 4 of Social Security | Member #

Joint Owner(s) / Name Change

If you did not originally have a Joint Owner(s) on your account and you wish to add one now, please complete the following information. Both the Primary Member and the new Joint Owner(s) must sign in the Authorizations & Signatures Section of this form. A copy of each new Joint Owner's Driver's License is required. The new Joint Owner(s) must be added to all accounts (except IRAs and loans).

Name	Social Security #	Date of Birth	Contact Phone #
Address, City, State & Zip		Mother's Maiden Name	eMail Address
Driver's License #, State & Expiration	Employer Name		Occupation

Name	Social Security #	Date of Birth	Contact Phone #
Address, City, State & Zip		Mother's Maiden Name	eMail Address
Driver's License #, State & Expiration	Employer Name		Occupation

Loan Request

Employer Address, City, State & Zip	Monthly Income	Date of Hire	Employer Phone #

Authorization & Signatures

You acknowledge receipt of the Membership Agreement & Disclosure, rate sheet, and fees. By signing below, you agree to accept the terms and conditions applicable to the accounts and services elected and to conform to the bylaws of Rize Federal Credit Union (RizeCU). You agree, as permissible by law, RizeCU may amend the agreement and bylaws from time to time.

RizeCU must verify the identity of any person seeking to open an account and maintain record of the information used to verify your identity. You authorize RizeCU to obtain a credit report and information from consumer reporting agencies, public databases and/or government agencies. You understand this will assist us in determining your initial and ongoing eligibility for an account and for making future credit opportunities available to you. You authorize us to give information concerning our experience with you to consumer reporting agencies. You authorize RizeCU to open additional accounts under this membership agreement in person or by phone. You understand all applicants listed above will have ownership of any future accounts opened under this membership agreement.

You agree to notify us of any changes in your name, address, phone numbers, email address or beneficiary designations in a timely manner. This agreement supersedes any prior agreements for this account.

Instructions: in the statement below, cross out item 2 if you have been notified by the IRS that you are currently subject to backup withholding because you failed to report all interest and dividends on your tax return. Cross out item 3 below and complete a W-8 BEN if you are not a U.S. person.

TIN certification and backup withholding information – Under penalties of perjury, I certify: (1) the number shown on this form is my correct taxpayer identification number; (2) I am not subject to backup withholding because; (a) I am exempt from back up withholding, or (b) I have been notified by the IRS that I am subject to backup withholding as a result of a failure to report all interest and dividends; or (c) the IRS has notified me that I am no longer subject to back up withholding; and (3) I am a U.S. person (including a resident alien).

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 | Date

Joint Owner Signature | Date

Joint Owner Signature | Date