

## Information for Joint Member Being Added to Account

Complete this section to add a joint member to an existing account. To remove a current joint member from an account, you will need to complete the Voluntary Removal of Joint Member Form

Add Joint Member To Account Number : \_\_\_\_\_

Current Member(s) Name: First \_\_\_\_\_ MI \_\_\_\_\_ Last \_\_\_\_\_

Current Joint Member (1) Name: First \_\_\_\_\_ MI \_\_\_\_\_ Last \_\_\_\_\_

Current Joint Member (2) Name: First \_\_\_\_\_ MI \_\_\_\_\_ Last \_\_\_\_\_

**This request will affect all accounts (suffixes) which are associated with this account, EXCEPT for loan suffixes. In order for a joint member to be added to any loans, credit cards, credit lines, or overdraft protection a new Loan Application or Subsequent Action Form must be signed.**

**I/We voluntarily request that the name(s) below be added as joint member(s) of the Nymeo Federal Credit Union ("Nymeo") account(s) listed above, and if requested by me and any authorized user of a Visa® Check Card:**

Name(s) of Person(s) to be added:

Name: \_\_\_\_\_  
First \_\_\_\_\_ MI \_\_\_\_\_ Last \_\_\_\_\_

Current Address: Street \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Date of Birth (Mo., Day, Yr.) \_\_\_\_\_ Social Security No. (TIN) \_\_\_\_\_ Home Phone No., Cell or Other Contact No. \_\_\_\_\_

E-mail Address \_\_\_\_\_ Driver's License or Government ID No./State \_\_\_\_\_ Exp. Date (Mo., Day, Yr.) \_\_\_\_\_

Employer's Name \_\_\_\_\_ Office Phone No. \_\_\_\_\_

Employer's Address: Street \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Type of Business \_\_\_\_\_ Job Title \_\_\_\_\_ No. of Years \_\_\_\_\_

**Disclosure Agreement and Survivorship Designation**

I/We, the current member(s) and new joint members(s) acknowledge that membership at Nymeo comes with certain ongoing responsibilities. By signing this document, my joint members(s), if any, and I/we agree to abide by the disclosed terms and conditions of all accounts or services that I/we receive at Nymeo and the terms and provisions of the Membership and Account Agreement. These terms and conditions are disclosed in accordance with applicable state and federal laws and are provided in the disclosure and agreement forms. The survivorship designation on my primary savings account applies to all other joint accounts with the same joint member unless specifically designated otherwise for a particular account.

Security Interest: I/We acknowledge and pledge to Nymeo a statutory lien in my/our shares and dividends on deposit in all joint and individual accounts and any monies held by Nymeo now and in the future to the extent of any loan made and any charges payable. The statutory lien does not apply to shares in any Individual Retirement Account.

I/We acknowledge and pledge to Nymeo a security interest in the collateral securing loan(s) that I/we have with Nymeo now and in the future, including any type of change or increase; and any proceeds from the sale of such collateral and of insurance thereon not to exceed the unpaid balance of any loan(s). This security interest in collateral securing other loans does not apply to loan(s) on my/our primary residence.

Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account, including joint members and authorized signers. What this means for you: When you open an account, we will ask you for your name, 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. It may be necessary for Nymeo to restrict account access or delay the approval of loans pending further verification. Property may be transferred to the appropriate state if there has been no activity within the time period specified by state law.

All joint account members/signers are considered equal owners and joint tenants with the right of survivorship.

By signing, I/we acknowledge I/we have read and agree to the information/Disclosure above and consent to adding the joint member(s) to the account.

Member(s) Signature \_\_\_\_\_ Date \_\_\_\_\_

Joint Member (1) Signature \_\_\_\_\_ Date \_\_\_\_\_

Joint Member (2) Signature \_\_\_\_\_ Date \_\_\_\_\_

**Tax Certifications**

Under penalties of perjury, I/we certify that the Social Security Number listed above is correct and that I/we am/are not subject to backup withholding. I/ We also certify that I/we am/are a U.S. person (includes a U.S. 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.

Signature of Member (Required) \_\_\_\_\_ Date \_\_\_\_\_

Signature of Joint Member (If Applicable) \_\_\_\_\_ Date \_\_\_\_\_

**By checking this box, I/we certify that I/we am/are a non-resident alien and I/we have completed a Form W-8BEN.**

**Note: If you are a POA, copy of POA is required.**

**For Nymeo Use Only**

\_\_\_\_\_  
**Nymeo Employee** **Date**  
Teller# \_\_\_\_\_ Initials \_\_\_\_\_

**Check List: IF PERMANENT AGREEMENT OR OPEN END LOAN EXIST, HAVE NEW MEMBER SIGN LOAN APPLICATION OR SUBSEQUENT ACTION FORMS FOR LOANS THAT NEW MEMBER IS BEING ADDED TO.**

- Savings \_\_\_\_\_ (suffix)
- Checking \_\_\_\_\_ (suffix)
- Money Market \_\_\_\_\_ (suffix)
- My Nymeo Online Access Reset \_\_\_\_\_ (suffix)
- Issue Joint Member:  VISA CheckCard
- Other \_\_\_\_\_ (suffix)
- Share Certificate(s) (Nos.) \_\_\_\_\_
- Trustee Account \_\_\_\_\_ (Co-Trustee)
- Custodial Account (Custodian)** \_\_\_\_\_