



Membership Change Form Checklist

Please use the Membership Change Form to:

- Make a name change on your accounts
- Add a Joint Owner to any or all of your DCU accounts
- Change your address

To speed the processing of your application, please follow these steps:

1. Fill out the Membership Change Form completely and sign it. Incomplete or unsigned forms will delay processing your request.
2. If adding a Joint Owner who is not currently a DCU Member, required identification must be provided.
3. Fax your completed form to 866.874.7820 or mail it to:

Digital Federal Credit Union
Account Services Center
220 Donald Lynch Boulevard
PO Box 9130
Marlborough, MA 01752-9130

What you can expect

Once you mail your application...

- Allow 2 weeks for your request to be processed. You'll be able to view your account changes on PC Branch at that time. Visit dcu.org and login with your Member Number and secret PIN (Personal Identification Number).



BANKING - THE DCU WAY

Digital Federal Credit Union • 220 Donald Lynch Blvd • PO Box 9130 • Marlborough, MA 01752-9130
508.263.6700 • 800.328.8797 • dcu.org • dcu@dcu.org

Membership Change Form

Prime Owner's Legal Name _____ Member # _____ SSN _____

Residential Address _____

Instructions: Complete only the section(s) applicable to the change(s) you are making. In all cases, you MUST sign your name in Section IV of this form. If adding a joint owner to a new or existing account, ordering a joint owner ATM or Check Card, or changing the joint owner's name, he or she MUST also sign in Section IV.

I. Address Change (give NEW residential address only)

Street _____ Apt # _____

City _____ State _____ ZIP _____

Phone: Home (____) _____ Work (____) _____ email _____

II. Name Change (two forms of verification must accompany this application)

Prime Owner Joint Owner

Previous Name (please print) _____ Change To _____

If I have a current DCU VISA®, Check Card, or ATM Card, I understand that a new card(s) will be issued in my new name.

III. Add Joint Owner to Savings, Checking and Certificates

I understand that this is **in addition** to any joint owner I currently have listed on an account, if applicable. If my intention is to replace a joint owner, I must complete a "Change of Ownership Authorization Form." NOTE: I understand I cannot add a joint owner to my DCU Visa or other loan.

IMPORTANT INFORMATION: We are required, by federal law, to obtain, verify, and record information that identifies each person opening or having access to a DCU Account. We will ask for your legal name, residential address, Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN), Phone Number, and Date of Birth.

REQUIRED IDENTIFICATION: No individual can be named on this account in any capacity without having provided the following current identification, one of which must include a picture and one of which must reflect the individual's current residential address as given. If one of these forms of identification includes both you need only submit that one: • US Driver's License • US Social Security Card • Passport • US Military ID • US Work Visa • Other Government Issued picture ID (2nd ID always required). DCU reserves the right to request additional identification.

If you are already a DCU member you are not required to provide the **REQUIRED IDENTIFICATION**. But you must provide your DCU Member # and SSN below.

First Joint Owner's Legal Name _____ SSN/ITIN _____ DOB ____/____/____ Phone (____) _____

Residential Address _____ Apt# _____ City/State/ZIP _____

Yrs at this Address ____ If less than 2, Previous Address: _____ DCU Member # (if applicable) _____

ADD JOINT OWNER TO EXISTING: Savings Checking* DCU Ltd Holiday Club Money Market Member Desc. Certificate
Account # ____ Account # ____ Account # ____ Account # ____ Account # ____ Account # ____ Account # ____

* Please Issue a DCU Check Card or ATM Card (circle one) in this joint owner's name.

Additional Joint Owner's Legal Name _____ SSN/ITIN _____ DOB ____/____/____ Phone (____) _____

Residential Address _____ Apt# _____ City/State/ZIP _____

Yrs at this Address ____ If less than 2, Previous Address: _____ DCU Member # (if applicable) _____

ADD JOINT OWNER TO EXISTING: Savings Checking* DCU Ltd Holiday Club Money Market Member Desc. Certificate
Account # ____ Account # ____ Account # ____ Account # ____ Account # ____ Account # ____ Account # ____

* Please Issue a DCU Check Card or ATM Card (circle one) in this joint owner's name.

IV. Signatory Authorization and Agreement

By signing below I, meaning each and all who sign this form, request the changes listed above and agree that, except as indicated on this form, the information, terms, and conditions set forth in my initial Membership Application as well as the *Truth-in-Savings Disclosure and Account Agreements*, and the *Electronic Services Disclosure and Agreements*, which I previously received remain in full force and effect. Further I authorize you to gather and exchange whatever credit, checking account, and employment information you consider appropriate from time to time.

X _____
Prime Owner's Signature Date

X _____
First Joint Owner's Signature Date

X _____
Additional Joint Owner's Signature Date

Internal Use Only

JO #1 ID Type _____ # _____ Exp ____/____/____ Add'l Doc Rec'd _____

JO #2 ID Type _____ # _____ Exp ____/____/____ Add'l Doc Rec'd _____

Received ____/____/____ Processed by (#) _____ X-Ref (#) _____ Audited by (#) _____

