



## Checklist for Adding a Joint Owner to an Existing Account

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Please use this form to add a Joint Owner to an existing DCU Account.

To complete this process, please follow these steps:

1. Fill out the Add Joint Owner to Existing Account Form completely and sign. 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. Acceptable forms of identification are outlined within the form.
3. Fax your completed form to 866.874.7820 or mail to:

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

## What you can expect

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Once you mail your application...

- Allow 2 weeks for your request to be processed. You'll be able to view your account changes on Online Banking at that time. Visit [dcu.org](http://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.
P.O. Box 9130 • Marlborough, MA 01752-9130
508.263.6700 • 800.328.8797 • dcu.org • dcu@dcu.org

Application to Add a Joint Owner
to an Existing Account

Prime Owner's Name \_\_\_\_\_ Member # \_\_\_\_\_ SSN \_\_\_\_\_

I understand that this is an addition to any joint owner(s) 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 a 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 the joint owner being added is already a DCU member s/he is not required to provide the REQUIRED IDENTIFICATION but must provide Name, DCU Member # and SSN below.

Form for adding a joint owner (1) with fields for Legal Name, DCU Member #, SSN, DOB, Phone, Residential Address, City, State, ZIP, and previous address.

Table titled 'Add Joint Owner (1) to:' with rows for Savings, Checking, Debit Card, Ltd, Money Market, Member Described, Holiday Club, and Certificate, each with a '#' column.

Form for adding a joint owner (2) with fields for Legal Name, DCU Member #, SSN, DOB, Phone, Residential Address, City, State, ZIP, and previous address.

Table titled 'Add Joint Owner (2) to:' with rows for Savings, Checking, Debit Card, Ltd, Money Market, Member Described, Holiday Club, and Certificate, each with a '#' column.

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 remain in full force and effect as do any terms and conditions related to additional products or services I have requested such as Overdraft Payment Services. Further I authorize you to gather and exchange whatever credit, checking account, and employment information you consider appropriate from time to time.

X \_\_\_\_\_ X \_\_\_\_\_ X \_\_\_\_\_
Prime Owner's Signature Date Joint Owner's (1) Signature Date Joint Owner's (2) 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 (#)