

UNIVERSITY CREDIT UNION REQUEST FOR NAME CHANGE

PLEASE COMPLETE ALL AREAS IN INK (print or type)

My name is currently listed as: _____ on my UCU accounts and in my account relationships with you. My name has changed due to _____ and I hereby state my present name is [print] _____. I have presented a valid government issued ID or if this document is mailed attached is a legible copy of a current valid passport or USA state issued Driver's license/identification issued in my new name. I understand a notary may be required if this document and ID are not presented in our branch.

New Name [Last]: _____ [First]: _____ [Middle]: _____

SSN or TIN: _____ Date of Birth: _____

Email address: _____ Drivers Lic # & State: _____

Place of Birth: _____ Mother's Maiden Name: _____

Home Phone[area code &#] _____ Work # _____ Cell # _____

If there is no change to address records please initial here: _____

Current Home address [not P.O. Box]: _____

Current Mailing address if different than residence: _____

By signing below, I understand and agree that when the Credit Union (UCU) enters this name change that my name will be changed in all my account relationships with the Credit Union. This means that my name will change on all accounts with UCU such as accounts on which I am an owner or joint owner, a beneficiary, or in any other relationship with right of survivorship, custodian, or other representative capacity, borrower, co-borrower or guarantor and UCU records will reflect the new name. An exception to this may be cases where I am serving in a representative capacity through a court order such as a conservator or executor and in those cases I will have to provide UCU with a valid court document that shows that the court has recognized my name change before this document will be accepted.

TIN CERTIFICATION AND BACKUP WITHHOLDING INFORMATION

By signing below, 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 a U.S. resident alien).

Instructions: Cross out item 2 above 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.

The IRS does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

New Name Signature: _____ Date: _____

(rev. 12-18-13)

For UCU use only: Date accepted: _____ UCU empl. _____ All acct. relationships verified by _____

All account numbers with signing authority [owner, joint, auth sig.]: _____ / _____ / _____ / and

_____ / _____ ID # and issuer: _____ Exp. Date: _____

Replacement Cards: Yes/No MC, ATM, VCC (circle all needed) VCC acct # _____ Intials for card ret. _____

Reorder Checks with address and name change: Yes/No (circle) If yes, Service Request Form must be completed.

OFAC completed [date & tlr#] _____ Date change completed and card/check orders processed: _____

Image as Account Modification on account # _____ / _____ / _____