

Name \_\_\_\_\_ Member # \_\_\_\_\_ E-mail: \_\_\_\_\_

I request cross-account access to the following University Credit Union accounts that name me as owner, joint owner, authorized signer and/or co-maker:

<u>Account</u>	<u>Add</u>	<u>Delete</u>	<u>Suffix Type</u> (circle one type per line)	<u>Suffix Numbers</u> (if "All" not selected)
_____	<input type="checkbox"/>	<input type="checkbox"/>	Share/Loan/Certificate/All	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	Share/Loan/Certificate/All	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	Share/Loan/Certificate/All	_____
_____	<input type="checkbox"/>	<input type="checkbox"/>	Share/Loan/Certificate/All	_____

Only loan co-makers will have full access to lines of credit. Joint owners and authorized users will have payment-only access to loans. The eBranch and Fone-Teller and offers full cross-account access. IRAs, CUTMAs, Coogan Accounts and Certificates are for viewing only. Account transfers initiated by University Credit Union will use only funds from the Overdraft Loan or share accounts with the same account number as the transactions being processed (funds cannot be taken from share accounts from the above-listed cross accounts to cover posted transactions). Please contact University Credit Union for any questions regarding cross-account access at (800) UCU-4510, ext 1.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Daytime Phone

UCU use: Rec'd by \_\_\_ / FM by \_\_\_

Online application

(9/18)

## Instructions for completing the Cross-Account Authorization form

Cross Account Authorization allows a member with ownership in more than one credit union account to access all their accounts through the eBranch and Fone-Teller services. When linked through the member's primary UCU account, members can get account balances and make transfers between separate account numbers. Please note that this form is to be used only to gain access to accounts that you are named as co-owner. University Credit Union will not be able to process the form if there is no evidence that the person filling out this form is not a co-owner of the account that they are trying to access.

By logging in with your primary account number, you will gain access to any account in which you are named as co-owner, as listed above.

### Completion Instructions:

1. Please complete name, UCU Account Number and e-mail address.
2. In the **Account** section, please indicate if you would like to add or delete cross-account access to another account.
3. **Suffix Type:** Please select the account suffixes that you would like to access. Please note that if you are a co-owner of the entire account you are trying to access, please circle **all**. If you are not a co-owner in every suffix, please circle suffix type and write in the suffix(es) that you would like to access.

This form can be mailed or faxed to UCU.

**Fax:** (310) 473-7182

**Mailing Address:** University Credit Union  
Attn: Operations Services Dept.  
1500 S. Sepulveda Blvd.  
Los Angeles, CA 90025