

Instructions for Change of Account Form

Please complete the form as follows:

1. Member Information

This information is required for all changes to the account.

2. Name Change

The individual changing their name on the account must sign and print their former name and their new name. Proof of legal name change such as a copy of marriage license or divorce decree is required. A fee will be assessed if you need a new *Advantages* Check Card or *Access* Card. Please refer to the fee schedule for the replacement card fee. If you have a UECU checking account, new checks will be needed. If you would like UECU to place a reorder with the same design, simply check the box. If you would prefer to order checks with another design yourself, don't check the box and we will contact you with a reorder number. Your account will be charged when the order is shipped.

3. Add Joint Owner(s)

This section must be fully completed to add a joint owner to the account. Please read the terms of joint ownership. If you are adding an owner to an existing UECU checking account, new checks will be needed. If you would like UECU to place a reorder with the same design, simply check the box. If you would prefer to order checks with another design yourself, do not check the box and we will contact you with a reorder number. Your account will be charged when the order is shipped. You must have a UECU checking account to request an *Advantages* Check Card or *Access* Card. *All owners on the account must sign the Signature Section of the form.*

4. Address Change

Please enter your old address and new address where indicated. The signature of an account owner is required at the Signature Section of the form.

5. Savings Account Trust (Payable on Death Account)

Please enter the name, SS# and the date of birth of the individual to receive the funds in the account after the owner's death. Please note: The beneficiary is not authorized to receive balance information, perform transactions on the account or receive any proceeds until the owner has deceased. The signature of the account owner is required at the Signature Section.

6. Closing of a Credit Union account

This section may be used to close the accounts listed. The funds in these accounts may be disbursed by check or may be transferred to any other existing UECU account. The *Advantages* Check Card and *Access* Card accounts will be closed automatically if the checking is closed. The card (cut through the numbers) should be returned to the Credit Union. The Share Savings Account may only be closed after any existing lending obligations are paid in full. The signature of an account owner is required to close any of the mentioned accounts. In the case of a share savings, the signatures of all account owners, primary and joint, are required.

7. Signature Section

The signature of the account owner is required as described above. For the protection of the member's personal and financial data, signatures are compared to the signatures on file.

Have a question or need further assistance with completing this form?

Call Member Service at 1-800-288-6423 nationwide or (610)927-4000 in Reading, or email us at Advantages@uecu.org.