

COAST GUARD EMPLOYEES CREDIT UNION

Hale Boggs Federal Building, 500 Poydras St. Rm. 1226
New Orleans, LA 70130-3396

Web: www.coastguardecu.net

Toll free: 800-772-6163
Direct: 504-671-2287 or -2289
Fax: 504-671-2290 or 877-427-3291



Account Joint Ownership (Print or Type Clearly)

E-mail: cgecu@coastguardecu.net

Copy of valid state/government photo identification required for each joint owner for verification

This form is for adding, changing or removal of account joint ownership to new accounts or existing accounts.

Please read and follow the instructions carefully.

Form must be signed by each party and the Primary Account Owner to be effective.

Primary Account Owner Information:				CREDIT UNION STAFF USE:	
Account number:		Primary Account Owner name:		Date Received:	
Type of change requested: <input type="checkbox"/> New <input type="checkbox"/> Change <input type="checkbox"/> Addition <input type="checkbox"/> Replace previous request				Date Entered:	
Primary Joint Owner: (not the primary owner, this is the first joint owner to be on the account.)					
Last Name:		First:		M.I.:	Suffix: <input type="checkbox"/> Jr. <input type="checkbox"/> Sr. <input type="checkbox"/>
Social Security Number:		Driver's License (state and number):		Birth Date:	
Current Mailing Address:		Apartment/Unit #	City:		State: Zip code:
Home Phone:		Cell Phone:		Email:	
		Primary Joint Owner's Signature		Date signed	
If Primary Joint Owner is other than spouse, then spouse must sign below:					
I am the spouse of the Primary Account Owner and by my signature below I am acknowledging I am not listed as the Primary Joint Owner on this account.					
Printed name of spouse		Signature of Spouse		Date signed	
Additional Joint Owner: (Others you are authorizing access to the account.)					
Last Name:		First:		M.I.:	Suffix: <input type="checkbox"/> Jr. <input type="checkbox"/> Sr. <input type="checkbox"/>
Social Security Number:		Driver's License (state and number):		Birth Date:	
Current Mailing Address:		Apartment/Unit #	City:		State: Zip code:
Home Phone:		Cell Phone:		Email:	
		Additional Joint Owner's Signature		Date signed	

Primary Account Owner
Initials:

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Account Joint Ownership (Print or Type Clearly) (Continuation)

Additional Joint Owner: (Others you are authorizing access to the account.)									
Last Name:		First:		M.I.:	Suffix: <input type="checkbox"/> Jr. <input type="checkbox"/> Sr. <input type="checkbox"/>				
Social Security Number:		Driver's License (state and number):		Birth Date:					
Current Mailing Address:		Apartment/Unit #	City:	State:	Zip code:				
Home Phone:	Cell Phone:		Email:						
		Additional Joint Owner's Signature		Date signed					
Additional Joint Owner: (Others you are authorizing access to the account.)									
Last Name:		First:		M.I.:	Suffix: <input type="checkbox"/> Jr. <input type="checkbox"/> Sr. <input type="checkbox"/>				
Social Security Number:		Driver's License (state and number):		Birth Date:					
Current Mailing Address:		Apartment/Unit #	City:	State:	Zip code:				
Home Phone:	Cell Phone:		Email:						
		Additional Joint Owner's Signature		Date signed					
Terms and Conditions									
<ul style="list-style-type: none">➤ I understand that only the Primary Account Owner can add, change or delete Joint Ownership on an active account in good standing.➤ I understand that any assigned Joint Account Holder has full access to the information on this account and can withdraw or deposit funds to the account.➤ I understand that only the Primary Account Owner can apply for a loan at this credit union, that Joint Ownership does not allow them this privilege.➤ I understand that by granting Joint Account Ownership that I am also allowing this individual to have online access to the account.➤ I understand that only the Primary Account Owner can close this account. <p>I acknowledge the above terms and conditions by my signature below:</p> <table border="1"><tr><td colspan="2"></td></tr><tr><td>Applicants Signature</td><td>Date signed</td></tr></table>								Applicants Signature	Date signed
Applicants Signature	Date signed								
Application Instructions									
<ol style="list-style-type: none">1. Only completed original documents can be accepted at the credit union office.2. All Joint Account Owners must have a completed IRS Form W-9 on file, blank forms can be obtained from http://www.irs.gov.3. All Joint Account Owners must provide a copy of valid government photo identification prior to changes taking effect.									