

NEW ACCOUNT APPLICATION

IMPORTANT ACCOUNT OPENING INFORMATION: Federal law requires us to obtain sufficient information to verify your identity. You may be asked several questions and to provide one or more forms of identification to fulfill this requirement. In some instances we may use outside sources to confirm the information. The information you provide is protected by our privacy policy and federal law.

Who Recommended Us to You? _____

SERVICES REQUESTED

Debit/Check Card(s) - No. Requested: _____ Online Banking

OWNERSHIP OF ACCOUNT

Not all forms of ownership may be allowed in your state. Check with your financial institution.

Individual Joint Trust - Separate Agreement Completed

BENEFICIARY DESIGNATION

Revocable Trust or Pay-On-Death Beneficiary

Name _____ DOB _____ SSN _____

Address _____ Phone # _____ %

Name _____ DOB _____ SSN _____

Address _____ Phone # _____ %

FOR INSTITUTION USE

Date _____

Account No. _____

Eligibility for Membership _____

TYPE OF ACCOUNT

Savings Checking

Money Market CD

Sub-Savings

INDIVIDUAL APPLICATION INFORMATION

Name (First, Middle, Last) _____ Social Security No. _____

Birth Date _____ Telephone No. _____ Driver's Lic. No./Passport No., Issuer, Issue Date, Exp. Date _____

Address (Street, City, State & Zip) _____ County _____

Employer _____ Position/Title _____

JOINT APPLICANT INFORMATION

Name (Last, First, Middle) _____ Social Security No. _____ Relationship _____

Birth Date _____ Telephone No. _____ Driver's Lic. No./Passport No., Issuer, Issue Date, Exp. Date _____

Address (Street, City, State & Zip) _____

Employer _____ Position _____

JOINT APPLICANT INFORMATION

Name (Last, First, Middle) _____ Social Security No. _____ Relationship _____

Birth Date _____ Telephone No. _____ Driver's Lic. No./Passport No., Issuer, Issue Date, Exp. Date _____

Address (Street, City, State & Zip) _____

Employer _____ Position _____

True Sky Credit Union is hereby authorized to recognize any of the signatures subscribed on this document in the payment of funds of the transaction of any business for this account. The joint owners of this account hereby agree with each other and with the credit union that all money in the account(s) or deposited in to the account(s), by any or all of the joint owners, will be subject to the withdrawal or receipt by any of them, and payment to any of them or the survivor or survivors shall be valid and they agree to discharge the credit union from any liability for such payment. The joint owners also agree to the terms and conditions of the account as established by the credit union from time to time. Any or all of the joint owners may pledge all or any part of the shares in this account as collateral security to a loan or loans from the credit union. The right or authority of the credit union under this agreement shall not be changed or terminated by the owners, or any of them except by written notice to the credit union which shall not affect transactions previously made.

BACKUP WITHHOLDING CERTIFICATIONS

The number shown on this form is my correct taxpayer identification number. Under penalties of perjury, I certify the statements in this section and that I am a U.S. person (including a U.S. resident alien).

EXEMPT RECIPIENTS - I am an exempt recipient under the Internal Revenue Service Regulations. (See below.)

BACKUP WITHHOLDING - I am not subject to backup withholding either because I have not been notified that I am subject to backup withholding as a result of a failure to report all interest or dividends, or the Internal Revenue Service has notified me that I am no longer subject to backup withholding.

NONRESIDENT ALIENS - A separate certification has been or will be completed.

Payees Exempt from Backup Withholding

We are **not required** to backup withhold if the payee is:

- ◆ An organization exempt from tax under section 501(a) or an individual retirement plan.
- ◆ The United States or any of its agencies or instrumentalities.
- ◆ A state, the District of Columbia, a possession of the United States, or any of their political subdivisions, or instrumentalities.
- ◆ A foreign government or any of its political subdivisions, agencies, or instrumentalities.
- ◆ An international organization or any of its agencies or instrumentalities.
- ◆ A corporation.
- ◆ A foreign central bank of issue.
- ◆ A dealer in securities or commodities required to register in the United States, the District of Columbia, or a possession of the United States.
- ◆ A futures commission merchant registered with the Commodity Futures Trading Commission.
- ◆ A real estate investment trust.
- ◆ An entity registered at all times during the tax year under the Investment Company Act of 1940.
- ◆ A common trust fund operated by a bank under section 584(a).
- ◆ A financial institution.
- ◆ A middleman known in the investment community as a nominee or custodian.
- ◆ A trust exempt from tax under section 664 or described in section 4947.
- ◆ Payments of **interest** not generally subject to backup withholding include the following:
 - ◆ Payments of interest on obligations issued by individuals. **Note:** *You may be subject to backup withholding if this interest is \$600 or more and is paid in the course of the payer's trade or business and you have not provided your correct taxpayer identification number to the payer.*
 - ◆ Payments of tax-exempt interest (including exempt interest dividends under section 852).
 - ◆ Payments described in section 6049(b)(5) to nonresident aliens.
 - ◆ Payments on tax-free covenant bonds under section 1451.
 - ◆ Payments made by certain foreign organizations.
 - ◆ Payments of mortgage or student loan interest. Payments that are not subject to information reporting are also not subject to backup withholding. For details, see the regulations under sections 6041, 6041A, 6045, 6050A, and 6050N.

Other payees that **may be exempt** from backup withholding include:

SIGNATURES

By signing below, you certify that the information on this Membership Application is complete, true and submitted for the purpose of obtaining the accounts and services requested. You agree: You acknowledge receipt of and agree to the terms and conditions of the Membership Application, Truth in Savings Rate and Fee Schedule, Account Agreements including the Funds Availability Policy Disclosure, Visa Check Card Disclosure Statement, Online/Mobile/Agreement and Disclosure, if applicable, and to any amendment True Sky Credit Union makes from time to time which are incorporated herein.

Applicant's Signature

Date

Joint Applicant's Signature

Date

Joint Applicant's Signature

Date