

**SAN MATEO CITY EMPLOYEES FEDERAL CREDIT UNION  
MEMBERSHIP APPLICATION & ACCOUNT AGREEMENT**

ACCT. NO. \_\_\_\_\_ MEMBER NAME \_\_\_\_\_ DATE \_\_\_\_\_

NEW MEMBER

Eligibility: i.e. City Employee, Son, Daughter, etc.)

(Date Opened)

INDIVIDUAL ACCOUNT

JOINT ACCOUNT

*\* This card may be used for multiple accounts only if: 1) all accounts listed above are individual accounts of the member; or 2) all accounts listed above are owned by all joint owners shown below. Any changes and/or the addition of a new account(s) requires the consent and signature of all joint owners. A separate signature card must be used for additional accounts of the member with ownership other than that shown below.*

I HEREBY MAKE APPLICATION FOR MEMBERSHIP IN AND AGREE TO CONFORM TO THE BY-LAWS (AS AMENDED)  
OF THE **SAN MATEO CITY EMPLOYEES FEDERAL CREDIT UNION.**

**ACKNOWLEDGEMENT OF RECEIPT AND ACCEPTANCE OF TRUTH-IN-SAVINGS DISCLOSURE**

By signing below, I acknowledge that I have received a copy of the Credit Union's Truth-in-Savings Disclosure ("Disclosure") and that I have received a copy of the current Rate and Fee Schedule. All the terms, conditions and information contained in the disclosure and any amendments thereto ("Application") are by this reference incorporated in their entirety into this membership application and account agreement (application). I authorize the Credit Union to obtain credit reports in connection with this account and any future services provided by the Credit Union as permitted by law. I agree to be bound by the terms and conditions of the Disclosure and Application. I understand that the Credit Union may verify all information I have given on the Application.

**X**

MEMBER SIGNATURE

DATE

**X**

JOINT OWNER SIGNATURE

DATE

**MEMBER INFORMATION**

MEMBER NAME (PLEASE PRINT)

SOCIAL SEC. NO.

ADDRESS

CITY

COUNTY

STATE

ZIP

HOME PHONE

CELL PHONE

WORK PHONE

DRIVER'S LICENSE NO. (EXP. DATE)

EMPLOYER

DATE OF BIRTH

MOTHER'S MAIDEN NAME

EMAIL ADDRESS

CITY DEPARTMENT

**JOINT OWNER INFORMATION**

MEMBER NAME (PLEASE PRINT)

SOCIAL SEC. NO.

ADDRESS

CITY

COUNTY

STATE

ZIP

HOME PHONE

CELL PHONE

WORK PHONE

DRIVER'S LICENSE NO. (EXP. DATE)

EMPLOYER

DATE OF BIRTH

MOTHER'S MAIDEN NAME

## DESIGNATION OF BENEFICIARY (PAY-ON-DEATH PAYEE)

### SHARES BENEFICIARY (member)

In the event of my death and all other joint owners predecease me; I hereby designate the person(s) whose name(s) appears below as my beneficiary to receive any and all amounts in this account(s).

NAME OF BENEFICIARY	ADDRESS

MEMBER SIGNATURE X \_\_\_\_\_

### SHARES BENEFICIARY (joint owner)

In the event of my death and all other joint owners predecease me; I hereby designate the person(s) whose name(s) appears below as my beneficiary to receive any and all amounts in this account(s).

NAME OF BENEFICIARY	ADDRESS

JOINT OWNER SIGNATURE X \_\_\_\_\_

### OVERDRAFT PROTECTION YES NO

Share Draft Account overdrafts will be covered by a transfer from:

Share Account # \_\_\_\_\_ Share Account # \_\_\_\_\_ Loan # \_\_\_\_\_

### PAYER'S REQUEST FOR TAXPAYER IDENTIFICATION NO.

Name

**PART I. Taxpayer Identification Number (TIN).** Enter your TIN in the box below. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, refer to the W-9 Form, Specific Instructions, Part I. For other entities, it is your employer identification number (EIN). If you do not have this number, see Instructions **How to get a TIN** in the W-9 Form, Specific Instructions.

**NOTE:** If the account is in more than one name, see the chart on the W-9 Form, Specific Instructions.

Social Security No. or employer I.D. Number:

### PART II. Certification. 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 a 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. citizen or other U.S. person (defined in the W-9 Form, General Instructions).

**Certification Instructions.** You must 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. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. (See Certification Instructions in the W-9 Form).

Signature X \_\_\_\_\_ Date \_\_\_\_\_  
(Signature of the person whose TIN is stated above)

### - FOR CREDIT UNION USE ONLY -

Include name of system used to verify Member information: \_\_\_\_\_ This Application for Membership Approved By: \_\_\_\_\_

System: \_\_\_\_\_ Date \_\_\_\_\_ Signature: \_\_\_\_\_ Date \_\_\_\_\_