

CHANGE ADDRESS **AND/OR** NAME FORM

Member name \_\_\_\_\_

(Formally Known As) \_\_\_\_\_

**ID presented with updated name and account change card completed** \_\_\_\_\_

Account# \_\_\_\_\_ and **JOINT OWNER** 8888/9999 \_\_\_\_\_

**Effective date change** \_\_\_\_\_

**Other family accounts or accounts we need to change?**

Account # \_\_\_\_\_

Account# \_\_\_\_\_

Account# \_\_\_\_\_

**\*\*\*DO NOT USE SYMBOLS IN ADDRESS (i.e. # , / . , etc) 34 character max per address line;** the post office reads from the bottom up, so unit number would need to be on line 1 and the rest of the address would need to be line 2.

**\*\*\*RESIDENTIAL ADDRESS**

**\*\*\*MAILING ADDRESS**

**(HOME/PHYSICAL)**

Street, Unit. No. **(NO PO BOX)**

Street, Unit No. / PO Box (OK)

City, State, Zip

City, State, Zip

Work Phone \_\_\_\_\_ / Home Phone \_\_\_\_\_ / Cell Phone \_\_\_\_\_

(E-Mail Address)

**Signature**

**X** \_\_\_\_\_

Member signature or how new address was received **and how identified**. Be cautious, when possible have member put in writing and fax/mail to us. For security reasons a letter will be mailed acknowledging we made a change.

**FOR OFFICE USE**

Received by: \_\_\_\_\_ Date received \_\_\_\_\_  
Computer Changed by: \_\_\_\_\_ Date Changed \_\_\_\_\_

**DOES ACCOUNT HAVE THE FOLLOWING SERVICES?—INDICATE BY YES / NO:**

Checking account  YES /  NO (types \_\_\_\_\_) Edit Check Ordering System: \_\_\_\_\_ Date: \_\_\_\_\_

MasterCard (MC)  YES /  NO **\*\* CHECK EXPIRATION DATE FIRST** (Edit in SB) completed by: \_\_\_\_\_ Date: \_\_\_\_\_

IRA investment  YES /  NO (Edit in IRA system) by: \_\_\_\_\_ Date: \_\_\_\_\_

Board Member/Employee  YES /  NO (email Administrative Assistant)

**\*\*IF NAME CHANGE\*\***

Safe Box  YES /  NO (Update/Redo Safe Box Agreement/Entry Card)

Online Card Services (OCS-FSP)\*\* update cardholder name

**NAME CHANGES ONLY—ACCOUNT CHANGE CARD COMPLETED:**  YES  NO (route to new account card employee)

Audit done by: \_\_\_\_\_ Date: \_\_\_\_\_, auditor confirm all YES's have been initialed. Attach to daily report showing the changes and file.