



# Add or Remove Joint Account Holders

Use this form to add or remove joint account holders from one or more deposit accounts.

- To add joint account holders, all new and existing account holders must sign.
- To remove joint account holders, only the Primary account holder or the joint account holder removing themselves must sign.
- Account holders under age 18 require the signature of a parent or guardian who is on the account.

Please allow 10 business days to process your request upon BECU receipt.

## Step 1. Your information

<b>Your Full Name</b>	<b>Date of Birth</b>	<b>SSN / TIN (9 digits)</b>
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- Add joint account holder(s)       Remove joint account holder(s)

## Step 2. Primary account holder information

<b>Full Name</b>	<b>Date of Birth</b>	<b>SSN / TIN (9 digits)</b>
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<b>Street Address</b>
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<b>City</b>	<b>State/Province</b>	<b>ZIP/Postal Code</b>	<b>Country</b>
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<b>Mailing Address (if different than above)</b>
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<b>City</b>	<b>State/Province</b>	<b>ZIP/Postal Code</b>	<b>Country</b>
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<b>Email Address</b>	<b>Phone</b>	<b>Phone type</b> <input type="radio"/> Home <input type="radio"/> Mobile
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<b>ID Type</b>	<b>Issue Date</b>	<b>Expiration Date</b>
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<b>ID Number</b>	<b>State Issued</b>	<b>Country Issued</b>
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<b>Employment Status</b> <input type="radio"/> Employed <input type="radio"/> Self-employed <input type="radio"/> Retired <input type="radio"/> Unemployed <input type="radio"/> Never Employed
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<b>Employer (current or previous if not employed)</b>	<b>Occupation (current or previous if not employed)</b>
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### Step 3. Update the following accounts

All accounts listed must have the same primary and joint account holders to add a new joint account holder. Use a separate form for accounts with different account holders.

- Apply to all consumer deposit accounts currently open.
- Apply only to specific accounts below:

Account Number (10 digits)	Account Number (10 digits)
Account Number (10 digits)	Account Number (10 digits)
Account Number (10 digits)	Account Number (10 digits)

### Step 4. Remove joint account holders

If you are a joint account holder removing yourself, sign below. If you are a primary account holder, you can remove one or more joint account holders and sign below.

Full Name	Date of Birth	SSN/TIN (9 digits)
Full Name	Date of Birth	SSN/TIN (9 digits)
Full Name	Date of Birth	SSN/TIN (9 digits)

### Step 5. Add joint account holders

Select the type of account ownership to be applied to all accounts listed on this form.

- Joint with Right of Survivorship (JWROS):** Upon the death of any account holder, that person's interest in the account(s) becomes the property of the surviving account holder(s).
- Joint without Right of Survivorship (JWOROS):** Upon the death of any account holder, that person's interest in the account(s) becomes the property of the beneficiary (Payable on Death designees) or to be claimed according to applicable state law.
  - I understand that upon my death, my percentage of ownership of these accounts will be frozen and pass to any beneficiaries or be claimed according to applicable state law.
  - If JWOROS percentages are not specified, each owner will have an equal percentage of ownership. When specifying JWOROS percentages, they must total to 100%.

Primary account holder's designated percentage for JWOROS: \_\_\_\_\_%

## Add joint account holder details

### Type of Joint account holder

New Joint account holder       Existing Joint account holder

### Full Name

Date of Birth

SSN / TIN (9 digits)

Mother's Maiden Name

### Street Address

City

State/Province

ZIP/Postal Code

Country

### Mailing Address (if different than above)

City

State/Province

ZIP/Postal Code

Country

Email Address

Phone

Phone type

Home     Mobile

ID Type

Issue Date

Expiration Date

ID Number

State Issued

Country Issued

### Employment Status

Employed     Self-employed     Retired     Unemployed     Never Employed

Employer (current or previous if not employed)

Occupation (current or previous if not employed)

### Joint account holder's designated percentage for JWOROS

%

Issue a new debit card?

### Debit Card Design

Basic Red     Seahawks     KEXP     UW Gold     WSU Red     No Card

To learn more about BECU debit cards, visit [becu.org/debit](https://becu.org/debit).

## Add joint account holder details

### Type of Joint account holder

New Joint account holder       Existing Joint account holder

### Full Name

Date of Birth

SSN / TIN (9 digits)

Mother's Maiden Name

### Street Address

City

State/Province

ZIP/Postal Code

Country

### Mailing Address (if different than above)

City

State/Province

ZIP/Postal Code

Country

Email Address

Phone

Phone type

Home     Mobile

ID Type

Issue Date

Expiration Date

ID Number

State Issued

Country Issued

### Employment Status

Employed     Self-employed     Retired     Unemployed     Never Employed

Employer (current or previous if not employed)

Occupation (current or previous if not employed)

### Joint account holder's designated percentage for JWOROS

%

Issue a new debit card?

### Debit Card Design

Basic Red     Seahawks     KEXP     UW Gold     WSU Red     No Card

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## Add joint account holder details

### Type of Joint account holder

New Joint account holder       Existing Joint account holder

### Full Name

Date of Birth

SSN / TIN (9 digits)

Mother's Maiden Name

### Street Address

City

State/Province

ZIP/Postal Code

Country

### Mailing Address (if different than above)

City

State/Province

ZIP/Postal Code

Country

Email Address

Phone

Phone type

Home     Mobile

ID Type

Issue Date

Expiration Date

ID Number

State Issued

Country Issued

### Employment Status

Employed     Self-employed     Retired     Unemployed     Never Employed

Employer (current or previous if not employed)

Occupation (current or previous if not employed)

### Joint account holder's designated percentage for JWROS

%

Issue a new debit card?

### Debit Card Design

Basic Red     Seahawks     KEXP     UW Gold     WSU Red     No Card

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## Step 6. Agreements

- 1. Acknowledgment.** You have received, read, understood, and agree to all of the terms and conditions contained in the following Boeing Employees' Credit Union agreements and disclosures, all as amended to date and all of which you will retain for your records:
  - [BECU Consumer Account Disclosure](#)
  - [BECU Privacy Notice](#)
  - [Account Agreements Booklet](#)
- 2. Request ATM or Debit Card.** By selecting a Debit Card above, you expressly request BECU to issue such Debit Card to you.
- 3. Request Checks.** By requesting checks, you authorize BECU to debit the cost of the checks from your Checking Account at the time of the check order.
- 4. Joint and Primary Requests.** BECU may accept any order and instruction regarding the account(s) and any request for future services from the Primary or any Joint Account Holder(s) without the consent of or notice to the other Account Holder(s). The joint account holder will have ownership interest in, and legal liability for, a jointly held account.
- 5. Consumer Reports.** BECU may make inquiries necessary to evaluate your applications and to conduct periodic reviews of your BECU accounts, including ordering a credit report, and you instruct BECU to obtain and use such information in determining to notify you about other products and services. You agree that we may tell others about our credit experience with you and may report information about your accounts to credit bureaus. Late payments, missed payments, or other defaults on your accounts may be reflected in your credit report.
- 6. Privacy Notice.** All of the credit or other information concerning you that BECU may obtain now or in the future will be compiled, stored, and used in accordance with BECU's Privacy Notice as amended from time to time.
- 7. Marketing.** By providing your email address, you agree that BECU may send marketing material to you electronically.
- 8. Telephone Consumer Protection Act.** BECU and its service providers may contact you for non-marketing purposes at any telephone number you provide. BECU may use automated telephone dialing, text messaging systems, and electronic mail to contact you. The telephone messages are played by a machine automatically when the telephone is answered and may be recorded by your answering machine. Standard data and message rates may apply, and you agree that BECU will not be liable for such fees. You agree to update us promptly when your telephone number changes. At any time, you may update such information or revoke your consent to receive non-emergency calls or text messages at a telephone number assigned to a wireless device (or any service that charges on a per-call basis) by contacting us at 800-233-2328 or other reasonable means.

## Step 7. Acknowledgment

By signing below, I certify that I have read, understand, and agree with the above agreements. Further, I personally verified and confirmed that all information provided and displayed in this form is accurate, complete, true, and submitted for the purpose selected above. I understand that BECU will rely on such information in BECU's dealings with me.

<b>Signature</b>	<b>Printed Name</b>	<b>Date (mm/dd/yyyy)</b>
<b>Signature</b>	<b>Printed Name</b>	<b>Date (mm/dd/yyyy)</b>
<b>Signature</b>	<b>Printed Name</b>	<b>Date (mm/dd/yyyy)</b>
<b>Signature</b>	<b>Printed Name</b>	<b>Date (mm/dd/yyyy)</b>

If submitting this form via mail, please return all pages of the completed and signed form to:

BECU  
Attn: Account Servicing, M/S 1094-2  
P.O. Box 97050  
Seattle, WA 98124-9750

## BECU only

<b>Employee Name</b>	<b>Location Name</b>	<b>Date (mm/dd/yyyy)</b>
<b>ID Verified</b> <input type="checkbox"/>	<b>Primary Person Number</b>	