

b p f c u

ACCOUNT CHANGE FORM

I / We authorize the Credit Union to make and accept the following changes to my / our accounts:

SUBSEQUENT ACTIONS

TYPE OF CHANGE (Please indicate the type of change and complete only the information that affects the changes)

Member / Owner Information <input type="checkbox"/> CHANGE	Joint Owner(s) Information: <input type="checkbox"/> ADD <input type="checkbox"/> CHANGE <input type="checkbox"/> REMOVE
Convenience Signer <input type="checkbox"/> ADD <input type="checkbox"/> CHANGE <input type="checkbox"/> REMOVE	POD Beneficiary: <input type="checkbox"/> ADD <input type="checkbox"/> CHANGE <input type="checkbox"/> REMOVE
Other: <input type="text"/> <input type="checkbox"/> ADD <input type="checkbox"/> CHANGE <input type="checkbox"/> REMOVE	Account Type / Services: <input type="checkbox"/> ADD <input type="checkbox"/> CHANGE <input type="checkbox"/> REMOVE

ACCOUNT TYPE

The authorizations and information given herein, and form of ownership chosen in the **ACCOUNT OWNERSHIP SELECTION** section apply to all of the accounts listed unless the Credit Union is notified in writing of a change.

CHECKING SAVINGS MONEY MARKET CERTIFICATE OF DEPOSIT (CD) OTHER

ACCOUNT SERVICES

ONLINE BANKING ONECLICK (BILL PAY) DEBIT CARD APPLY FOR VISA GOLD CREDIT CARD
 APPLY FOR A LOAN APPLY FOR A MORTGAGE OVERDRAFT PROTECTION (indicate transfer priority)

MEMBER INFORMATION

Change of Legal Name of Member Change of Address and/or Phone Number

Member Number: <input style="width: 100%;" type="text"/>	
Member / Owner: <input style="width: 100%;" type="text"/>	SSN/TIN: <input style="width: 100%;" type="text"/>
Old Legal Name: <input style="width: 100%;" type="text"/>	Driver's License Number: <input style="width: 100%;" type="text"/>
Street: <input style="width: 100%;" type="text"/>	Date of Birth: <input style="width: 100%;" type="text"/>
City, State ZIP: <input style="width: 100%;" type="text"/>	Password: <input style="width: 100%;" type="text"/>
Home Phone: <input style="width: 100%;" type="text"/>	Email: <input style="width: 100%;" type="text"/>
Mobile Number: <input style="width: 100%;" type="text"/>	Work Number: <input style="width: 100%;" type="text"/>
Employer: <input style="width: 100%;" type="text"/>	
Employer Address: <input style="width: 100%;" type="text"/>	

JOINT MULTIPLE PARTY ACCOUNT INFORMATION

Change of Legal Name of Joint Owner Change of Address and/or Phone Number Add Joint Owner to Existing Account

①	Joint Owner: <input style="width: 100%;" type="text"/>	Phone: <input style="width: 100%;" type="text"/>
	Old Legal Name: <input style="width: 100%;" type="text"/>	SSN/TIN: <input style="width: 100%;" type="text"/>
	Street: <input style="width: 100%;" type="text"/>	Driver's License Number: <input style="width: 100%;" type="text"/>
	City, State ZIP: <input style="width: 100%;" type="text"/>	Date of Birth: <input style="width: 100%;" type="text"/>

②	Joint Owner: <input style="width: 100%;" type="text"/>	Phone: <input style="width: 100%;" type="text"/>
	Old Legal Name: <input style="width: 100%;" type="text"/>	SSN/TIN: <input style="width: 100%;" type="text"/>
	Street: <input style="width: 100%;" type="text"/>	Driver's License Number: <input style="width: 100%;" type="text"/>
	City, State ZIP: <input style="width: 100%;" type="text"/>	Date of Birth: <input style="width: 100%;" type="text"/>

REMOVAL OF JOINT OWNER

Joint owners listed below are deemed removed from all accounts listed in **ACCOUNT TYPE** section. Removal from an account terminates a joint owner's ownership of the account(s), including any membership share in the account(s). The termination of ownership rights does not affect the joint owner's liability to the Credit Union for any loan or other obligation. This removal changes the form of ownership for the account(s) listed in the **ACCOUNT OWNERSHIP SELECTION** section.

Name of Terminated Joint Owner:
 Name of Terminated Joint Owner:

AUTHORIZATION

I / We agree that the changes noted on this Form amend, as indicated, previously signed forms. I / We certify that the information on this Form is complete and true and that I / we agree to the terms and conditions of the Membership and Account Agreement, Truth-in-Savings Disclosure, Funds Availability Policy Disclosure, if applicable and to any amendments the Credit Union makes from time to time which are incorporated herein. I / We acknowledge receipt of a copy of the agreements and disclosures applicable to the accounts and the services requested herein. If an access card or EFT service is requested and provided, I / we agree to the terms of and acknowledge receipt of the Electronic Fund Transfers Agreement and Disclosure.

The undersigned hold harmless and agree to indemnify the Credit Union for all costs, losses and expenses resulting from the removal of a joint owner from an account.

If required by the Credit Union, removed joint owner(s) have signed below to show consent to their removal.

X _____
 Signature Date

X _____
 Signature Date

X _____
 Signature Date

X _____
 Signature Date

ACCOUNT OWNERSHIP SELECTION

Choose **ONE** of the following forms of account ownership by initialing next to the chosen form of ownership.

Please note: The type of ownership you select may determine how property passes upon your death. Your will may not control the disposition of funds held in some of the following forms of account ownership. You may choose to designate one or more convenience signers on an account, even if the account is not a convenience account. A designated convenience signer may make transactions on your behalf during your lifetime, but does not own the account during your lifetime. The designated convenience signer owns the account upon your death only if the convenience signer is also designated as a POD payee or trust account beneficiary.

The selection you make below will apply to all accounts listed in the **ACCOUNT TYPE** section.

SINGLE PARTY ACCOUNT WITHOUT PAYABLE ON DEATH (POD) DESIGNATION

The party to the account owns the account. On the death of the party, ownership of the account passes as a part of the party's estate under the party's will or by intestacy. The party to the account is listed as the Member/Owner.

SINGLE PARTY ACCOUNT WITH PAYABLE ON DEATH (POD) DESIGNATION

The party to the account owns the account. On the death of the party, ownership of the account passes to the POD beneficiaries of the account. The account is not a part of the party's estate. POD beneficiaries are listed in the **POD BENEFICIARIES** section. The party to the account is listed as the Member/Owner.

JOINT MULTIPLE PARTY ACCOUNT WITH RIGHT OF SURVIVORSHIP (all parties must initial)

The parties to the account own the account in proportion to the parties' net contributions to the account. The financial institution may pay any sum in the account to a party at any time. On the death of a party, the party's ownership of the account passes to the surviving parties. Parties to the account are listed as Member/Owner and Joint Owner.

JOINT MULTIPLE PARTY ACCOUNT WITHOUT RIGHT OF SURVIVORSHIP (all parties must initial)

The parties to the account own the account in proportion to the parties' net contributions to the account. The financial institution may pay any sum in the account to a party at any time. On the death of a party, the party's ownership of the account passes as a part of the party's estate under the party's will or by intestacy. Parties to the account are listed as Member/Owner and Joint Owner.

JOINT MULTIPLE PARTY ACCOUNT WITH RIGHT OF SURVIVORSHIP AND PAYABLE ON DEATH (POD) DESIGNATION (all parties must initial)

The parties to account own the account in proportion to the parties' net contributions to the account. The financial institution may pay any sum in the account to a party at any time. On the death of the last surviving party, the ownership of the account passes to the POD beneficiaries. POD beneficiaries are listed in the **POD BENEFICIARIES** section. Parties to the account are listed as Member/Owner and Joint Owner.

CONVENIENCE ACCOUNT (all parties must initial)

The parties to the account own the account. One or more convenience signers to the account may make account transactions for a party. A convenience signer does not own the account. On the death of the last surviving party, ownership of the account passes as a part of the last surviving party's estate under the last surviving parties will or by intestacy. The financial institution may pay funds in the account to a convenience signer before the financial institution receives notice of the death of the last surviving party. The payment to a convenience signer does not affect the parties' ownership of the account. The party / parties to the account are listed as Member/Owner and Joint Owner.

CONVENIENCE SIGNER DESIGNATION

Please complete this section if you have convenience signers on any of the accounts in the **ACCOUNT OWNERSHIP** section.

Account Type	Name(s) of Convenience Signer(s)	Signature(s) of Convenience Signer(s)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

POD BENEFICIARIES

Upon the death of the last account owner, ownership of the account shall be divided equally among the surviving beneficiaries listed in this section. The beneficiaries listed here are beneficiaries to all the accounts listed in the **ACCOUNT TYPE** section.

Name of Beneficiary	Identifying Information
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

FOR CREDIT UNION USE ONLY

OFAC CHECK DATE:
 Date of Membership: Opened / Approved By: Member Verification:
 IN-PERSON ONLINE EMPLOYMENT VERIFICATION
 BRANCH: CHECK SYSTEMS CREDIT REPORT

PLEASE RETURN THIS FORM TO BP FEDERAL CREDIT UNION

MAIL	FAX OR EMAIL	DROP OFF AT A BRANCH			
ATTN: MEMBER SERVICES P.O. BOX 941749 HOUSTON, TEXAS 77094	(281) 870-9251 INFO@BPFCU.ORG	REPUBLIC SQUARE 13501 KATY FRWY STE 1150 HOUSTON, TEXAS 77079	HELIOS PLAZA 201 HELIOS WAY STE 1.405 HOUSTON, TEXAS 77079	WESTLAKE I WESTLAKE PARK BLVD STE 1.2 HOUSTON, TEXAS 77079	MEMORIAL PLAZA 15455 MEMORIAL DR STE 200 HOUSTON, TEXAS 77079

VALID ID REQUIRED FOR ALL PARTIES