



Estate Account Application

Service Federal Credit Union Corporate Offices
Stateside: P.O. Box 1268, Portsmouth, NH 03802 | 800.936.7730
Overseas: Unit 3019, APO AE 09021-3019 | 00800.4728.2000

ACCOUNT SERVICES: (check all that apply)

- Primary Savings Account
- Visa® Debit Card
- Other _____
- Everyday Checking Account
- Go Paperless
- Dividend Checking Account
- Online Banking
- Money Market
- Share Transfer Overdraft Protection

IMPORTANT INFORMATION ABOUT OPENING A NEW ACCOUNT

To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account. What this means for you: When you open an account, we will ask for your name, address, date of birth and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents

Executor/Administrator Information: (person establishing account)

Full name: _____ SSN: _____ DOB: _____
 Home Phone: _____ Work Phone: _____ Mobile Phone: _____
 Street Address: _____ City/State/ZIP: _____
 Mailing Address: _____ City/State/ZIP: _____
 Email Address: _____ Mother's Maiden Name: _____
 Government ID: _____ Issue Date: _____ Expiration Date: _____ Document ID # _____

Estate Information

Estate Name: _____
 Mailing address: _____ City/State/ZIP: _____
 EIN: _____

Eligibility Requirements:

Under Estate Accounts, the decedent is required to be an existing member of Service Credit Union. You are eligible to open an Estate account if you are the qualified administrator for a deceased Service Credit Union member that resided within the United States on date of death.

The decedent's member number is: _____

Completed applications can be faxed, emailed or mailed along with supporting court orders naming the Executor/Administrator to:

Service Federal Credit Union
Attention: Inheritor Services
PO Box 1268
Portsmouth, NH 03802

Phone: 1-800-936-7730 ext. 2255
Fax: 603-430-6559
Email: Inheritorservices@servicecu.org



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Agreement: I certify that I am within the field of membership as described on page 1. By signing below I hereby make Application for a fiduciary membership with Service Federal Credit Union (d/b/a "Service Credit Union"), any reference in this form to "Service Credit Union" is a reference to Service Federal Credit Union and agree to conform to its laws and amendments thereof and subscribe for at least one share **by depositing and maintaining \$5 in a primary fiduciary share account; I understand that a pledge of \$5 will be placed on this primary share account.** I acknowledge receipt of the Credit Union Account Agreement and Disclosure Statements, Rate Schedule and Fees and transaction Limitations Schedule.

I certify that I have been duly qualified and/or appointed by a court to settle the above decedent's estate, including, but not limited to, the payment of taxes, debts, and distribution of assets and/or property belonging to the estate. By my signature, I acknowledge that Service Federal Credit Union assumes no responsibility for the administration of this estate account or the settlement of the above decedent's estate at any time. I understand that upon settlement of the decedent's estate, it is my responsibility to request the closure of the estate account.

If employed by the Department of Defense, I hereby authorize the Department of Defense and its various departments and commands to verify the information listed above and my social security number or other identifier and disclose my current address to authorized SERVICE FEDERAL CREDIT UNION officials so they may contact me in connection with my financial business, relationship with Service Credit Union. All information will be used solely in connection with my financial business relationship with SERVICE CREDIT UNION.

Membership is intended to provide credit union services to all who are eligible. Branch office service in Germany may be unavailable to some DoD retirees and their families based on the NATO Status of Forces Agreement with Germany and/or other Field of Membership restrictions.

INSTRUCTIONS TO SIGNER: If you have been notified by the Internal Revenue Service that you are subject to backup withholding due to Payee under reporting, and you have not received notice from the IRS that backup withholding has terminated, you must strike out the language in CLAUSE 2 of the Certification below.

CERTIFICATION TO THE TAXPAYER IDENTIFICATION NUMBER AND BACKUP WITHHOLDING

Under penalties of perjury, I certify that: (1) the number shown on this form is my correct taxpayer identification number; (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 backup withholding as a result of failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholdings, and (3) I am a U.S. person (including U.S. resident alien). **DOES NOT APPLY TO NON-RESIDENT ALIENS. Please refer to the Account Agreement and Disclosure for the Joint Account Agreement.**

Each Signer also agrees that the Credit Union may obtain any credit reference necessary including, but not limited to, Efunds, at any time while an account holder.

THE INTERNAL REVENUE SERVICE DOES NOT REQUIRE YOUR CONSENT TO ANY PROVISION OF THIS DOCUMENT OTHER THAN THE CERTIFICATIONS REQUIRED TO AVOID BACKUP WITHHOLDING.

CONSENT TO CONTACT- In the future, we (Service Federal Credit Union) may want to reach out to you by phone or text message in order to provide you with important information specific to your account or services you use, such as status updates on applications or alerts related to suspected fraudulent activity. The following language is included on this application to serve as your consent to allow us to do this. This consent is not required to obtain any accounts or services from Service Federal Credit Union, and you may choose to opt out at any time by any reasonable means.

By submitting this application, you agree we and/or our third-party providers, including debt collectors, may contact you by telephone or text message at any telephone number associated with your account, including wireless telephone numbers (i.e. cell phone numbers) which could result in charges to you, in order to service your account or collect any amounts owed to us. This consent does not include any contacts for advertising and telemarketing purposes. You further agree that our methods of contact may include use of pre-recorded or artificial voice messages, and/or use of an automatic dialing device, as defined by relevant law. You may withdraw this consent to be contacted at any time by any reasonable means. If you have provided a wireless telephone number in connection with any account, you represent and agree you are the wireless subscriber or customary user with respect to the wireless number provided and have the authority to give this consent.

Furthermore, you agree to notify us of any change to the wireless telephone number(s) which you have provided to us.

In order to help mitigate harm to you and your account, we may contact you on any telephone number associated with your account, including a wireless/cell phone number, to deliver to you any messages related to suspected or actual fraudulent activity on your account, data security breaches, or identity theft following a data breach, money transfers, or any other exigent messages permitted by applicable law. These contacts will not contain any telemarketing, cross-marketing, solicitation, advertising, or debt collection message of any kind. The contacts will be concise and limited in frequency as required by law. You will have an opportunity to opt-out of such communications at the time of delivery.

Signature of _____ Date: _____
Fiduciary:

_____ Inheritor Services Representative Name	_____ Branch Office 74
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