

EXCEL Federal Credit Union | CLUB MEMBERSHIP ENROLLMENT APPLICATION

Return this completed and signed application to any branch office or by mail to the address shown below, along with your \$5 deposit to open your account and a copy of your driver's license or permit (required if you have been issued one) as well as any joint owners of the account. In the event you do not have a driver's license or permit, provide a copy of your social security card or birth certificate. Please do not enclose cash. Questions? Contact Member Services at (770) 441-9235 or 1-888-441-9235.

New Member Information

- Yes, I want to be:
- Kids EXCEL Savings Club Member (I am 12 or younger)
 - CU Succeed Teen Club Member (I am between 13 and 17 years old)
 - Young Adult Club Member (I am between 18 and 24 years old)

Name of Related Excel Member *Relationship to Applicant*

- I have no family members that belong to EXCEL, but I want to join so I can get ahead financially.

Please supply the following information for the applicant:

New Member's Name *Social Security Number* *Date of Birth*

Address *City, State, Zip* *Phone Number*

Email address *Signature of Parent/Guardian Authorizing Permission to Open Account (required if younger than 13)*

- I would like to receive my statements online with email notification by regular mail

- Yes, I am 13 or older and would like a debit card. _____
Parent/Guardian's Signature Authorizing Permission to Receive Debit Card
(Required for those ages 13 to 17)

Joint Owner Information

This section must be completed if the new member is 17 or younger. Account owners younger than 18 require a joint owner 18 years of age or older. Joint owners are required to complete the section below, sign in the signature area, and provide a copy of their driver's license.

Joint Owner Name (1) *Social Security Number (1)* *Date of Birth (1)*

Address *City, State, Zip* *Phone Number*

Joint Owner Name (2) *Social Security Number (2)* *Date of Birth (2)*

Signatures

I hereby make application for membership in EXCEL Federal Credit Union. I agree to the terms of the Membership Agreement and Disclosures, and any future amendments thereto, posted on the EXCEL website or available in print by request.

Under penalty of perjury, I certify that:

- The number shown on this form is the correct taxpayer identification number (or I am waiting for one to be issued to me).
- I am a U.S. person (including U.S. resident alien).
- I am not subject to backup withholding because:
 - I am exempt from backup withholding
 - I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends
 - The IRS has notified me that I am no longer subject to backup withholding

The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

New Member Signature *Today's Date*

Joint Owner Signature (1) *Today's Date*

Joint Owner Signature (2) *Today's Date*



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