

MEMBERSHIP I'm eligible to join CEFCU:

- ☐ As an employee/alumni/student/contractor/member of: _____
(A contractor must work regularly at a sponsor facility.)
- ☐ As a family member of: _____ Relationship: _____

ACCOUNT OWNERSHIP

☐ Individual ☐ Joint ☐ Beneficiary **Account Number:** _____

PRIMARY OWNER				
First	Middle	Last	Date of Birth (MM/DD/YYYY)	
Address		City	State	Zip
Mailing Address (if different than above)		City	State	Zip
Social Security Number	Driver's License Number	State	Issue Date	Expiration Date
Phone Numbers:	Home	Work	Cell	
Email Address		Mother's Maiden Name		
Job Title		Employer Name		
JOINT OWNER				
First	Middle	Last	Date of Birth (MM/DD/YYYY)	
Address		City	State	Zip
Social Security Number	Driver's License Number	State	Issue Date	Expiration Date
Phone Numbers:	Home	Work	Cell	
Email Address				
Job Title		Employer Name		
BENEFICIARY (IF DESIGNATED)				
First	Middle	Last		
Relationship to Account Owner(s)		Social Security Number		
Address		City	State	Zip

USA Patriot Act (IMPORTANT INFORMATION ABOUT PROCEDURES FOR 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 you for your name, physical address, date of birth and other information that will allow us to identify you. We may also ask for your state-issued identification or other identifying documents.

Taxpayer Identification: Under penalties of perjury, I certify that: 1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and 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 a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and 3. I am a U.S. citizen or other U.S. person.

Account Agreement: By signing below, I hereby make application for membership in the Caltech Employees Federal Credit Union and agree to conform to its bylaws and amendments. I also agree that this account will be governed by the terms and conditions of the Caltech Employees Federal Credit Union Member/Account Agreements and Disclosures and acknowledge a copy will be provided to me. I authorize CEFCU to gather whatever information it considers necessary and appropriate, including a credit report.

Under penalties of perjury, I certify that the information provided on this card is true, correct and complete.

Primary Owner's Signature	Date	Joint Owner's Signature	Date
X		X	

MEMBERSHIP INVITATION ADDENDUM

PRIMARY OWNER: _____		Account Number: _____	
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JOINT OWNER			
First	Middle	Last	Date of Birth (MM/DD/YYYY)
Address		City	State Zip
Social Security Number	Driver's License Number	State	Issue Date Expiration Date
Phone Numbers: Home	Work	Cell	
Email Address			
Job Title		Employer Name	
Joint Owner's Signature <div style="font-size: 2em; font-weight: bold; color: #0070c0;">X</div>			Date

JOINT OWNER			
First	Middle	Last	Date of Birth (MM/DD/YYYY)
Address		City	State Zip
Social Security Number	Driver's License Number	State	Issue Date Expiration Date
Phone Numbers: Home	Work	Cell	
Email Address			
Job Title		Employer Name	
Joint Owner's Signature <div style="font-size: 2em; font-weight: bold; color: #0070c0;">X</div>			Date

BENEFICIARY (IF DESIGNATED)			
First	Middle	Last	
Relationship to Account Owner(s)		Social Security Number	
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First	Middle	Last	
Relationship to Account Owner(s)		Social Security Number	
Address		City	State Zip

Primary Owner's Signature <div style="font-size: 2em; font-weight: bold; color: #0070c0;">X</div>	Date
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