

# Information needed to update an account

## Personal Accounts

- Name change
  - New valid ID showing the new name
  - Court document or marriage certificate
- Address Change
  - You may be required to complete an address change form, or you may update using Digital Banking
- Adding a new member
  - All existing members must sign to add or remove a member
  - The following information will be required for any new members being added:
    - Name
    - Date of birth
    - Physical address
      - *Proof of address may be required if it is not up to date on your ID*
    - Mailing address (if applicable)
    - Employment-Occupation
    - Tax ID Number
    - Valid Unexpired Government Issued ID (i.e. driver's license, state identification card, military id, etc.)
      - Minors: School ID, Tribal ID, Birth Certificate, Social Security Card, Driver's Learners Permit
      - Contact the credit union for other types of acceptable ID
  - Phone number and email address (if applicable)

## Business Accounts / Club/Association Accounts

- Resolution or minutes noting the changes to be made to the account and defining account accessibility
  - Samples can be found on our resource page
- We may allow a responsible individual on the account to sign for the changes (depending on what is being changed)
- Personal information for persons added to the account
  - Name
  - Date of birth
  - Physical address
    - *Proof of address may be required if it is not up to date on your ID*
  - Mailing address (if applicable)
  - Employment-Occupation
  - Tax ID Number
  - Valid Unexpired Government Issued ID (i.e. driver's license, state identification card, military id, etc.)
  - Phone number and email address (if applicable)
- Updated Certificate of Beneficial Owners
  - Form found on our resource page
  - ID for all beneficial owners
- Signatures may be required on a new Business Service Agreement part 1

## Information needed to update an account

### Trust Accounts

- New Certificate of Trust/Memorandum of Trust
  - Must contain the date of the Trust and any amendments, the name and address of the current acting trustee(s), the powers of the trustee(s) relating to the purposes for which the certificate is being offered, the revocability or irrevocability of the Trust, the authority of co-trustees, and a statement that the trust has not been revoked, modified, or amended in any manner that would cause the representations contained in the certificate of trust to be incorrect.
- New TIN for the Trust if applicable
  - TIN for the Trust may be the Grantor's SSN or an EIN, which may be applied for at [www.irs.gov](http://www.irs.gov)
  - If Grantor is deceased, an EIN must be applied for
- Personal Information for trustees
  - Name
  - Date of birth
  - Physical address
    - *Proof of address may be required if it is not up to date on your ID*
  - Mailing address (if applicable)
  - Employer-Occupation
  - Tax ID Number (for the Trust and all trustees)
  - Valid Government Issued ID (i.e. driver's license, state identification card, military id, etc.)
  - Phone Number and email address (if applicable)