



Membership & Additional Deposit Product Enrollment

How did you hear about us?

If referred, by who?

I live/work/worship/study in _____ County

{ Membership, Accounts, and Services }

Please sign me up for:

Primary Share (\$5 to open, and an aggregate average daily balance of \$200, loan product, or active VISA to avoid monthly fee)

Checking (\$25 to open)
I would like the following information listed on my checks: (as stated to the right)

Name Address Joint Owner's Name
Phone Other _____

I plan to start Direct Deposit
Y N (please contact your payroll department or Heartland FCU).

I would like a Payroll Deduction (only with Direct Deposit)
Y N if yes, amount? _____
into which account(s)? _____

I would like to sign up for a VISA Check Card/Star Card.
Y N

Heartline Online – Internet Banking
(a temporary password will be emailed to you)
Once you receive the temporary password and log in for the first time, be sure to check out:

- eStatements
- Bill Pay
- Mobile Banking
- Text Notifications
- eLerts

- | | |
|--|--|
| <input type="checkbox"/> Share Certificate/IRA | <input type="checkbox"/> Line of Credit |
| <input type="checkbox"/> HSA Account | <input type="checkbox"/> Education Account |
| <input type="checkbox"/> Holiday Account | <input type="checkbox"/> Retirement Analysis |
| <input type="checkbox"/> Vacation Account | <input type="checkbox"/> Insurance Analysis |
| <input type="checkbox"/> Money Fund Account | <input type="checkbox"/> Debt Management Help |
| <input type="checkbox"/> VISA Credit Card | |
| <input type="checkbox"/> Loan if yes, which type? _____ | |

NOTE: SOME SERVICES WILL REQUIRE ADDITIONAL FORMS

PRIMARY Owner (please print)	
Social Security # _____	D.O.B. _____
Driver's License # _____	<input type="checkbox"/> Male <input type="checkbox"/> Female
Street Address _____	
City/State _____	
Zip/County _____	
Number of years at this address _____	
Prior address, if less than 2 years _____	
Home Phone _____	
Work Phone _____	
Cell Phone _____	
Email _____	
Home Owner? _____	Mortgage/Rent _____ /month
Employer _____	
Salary/Wages _____	
Are you a citizen or resident alien of the United States? <input type="checkbox"/> Y <input type="checkbox"/> N	

JOINT Owner (please print)	
Social Security # _____	D.O.B. _____
Driver's License # _____	<input type="checkbox"/> Male <input type="checkbox"/> Female
Street Address _____	
City/State _____	
Zip/County _____	
Number of years at this address _____	
Prior address, if less than 2 years _____	
Home Phone _____	
Work Phone _____	
Cell Phone _____	
Email _____	
Are you a citizen or resident alien of the United States? <input type="checkbox"/> Y <input type="checkbox"/> N	
Employer _____	
Salary/Wages _____	
JOINT OWNER WILL BE ON ALL ACCOUNTS	



AUTHORIZATION AND AGREEMENT AND TAXPAYER IDENTIFICATION NUMBER (TIN) CERTIFICATION AND BACKUP WITHHOLDING INFORMATION

Authorization and Agreement

Heartland Federal Credit Union is hereby authorized to recognize any of the signatures subscribed hereto in the payment of funds or the transaction of any business for this account. The joint owners of this account hereby agree with each other and with said credit union that all sums now paid in on shares or heretofore or hereafter paid on shares by any or all of said joint owners to their credit as such joint owners with all accumulations thereon, are and shall be owned by them jointly, with right of survivorship and be subject to the withdrawal or receipt of any of them, and payment to any of them or the survivor or survivors shall be valid and discharge said credit union from any liability for such payment. Any or all said joint owners may pledge all or any part of the shares in this account as collateral security to a loan or loans. The right or authority of the credit union under this agreement shall not be changed or terminated by said owners, or any of them except by written notice to said credit union which shall not affect transactions theretofore made.

Taxpayer Identification Number/Certification

"Under penalty of perjury, I certify (1) that the number shown on this form is my correct taxpayer identification number, and (2) that I am not subject to backup withholding either because I have not been notified that I am subject to backup withholding as a result of a failure to report all interest or dividends, or the internal revenue service had notified me that I am no longer subject to backup withholding." (Instruction to signer: If you have been notified by the Internal Revenue Service (IRS) that you are subject to backup withholding due to payee under reporting and you have not received a notice from the IRS that the backup withholding has terminated, you must strike out the language in clause 2 of whichever certification you sign.) By signing, the undersigned request(s) the described services and agrees to the terms and conditions governing the services (which will be mailed to me upon approval), including any fees and charges. The undersigned agree(s) that all information is accurate and authorizes the Heartland Federal Credit Union in each of my deposit accounts which may be exercised if my usage of any account results in the creation of a debt to Heartland Federal Credit Union.

USA PATRIOT ACT DISCLOSURE

In this disclosure, "you" and "your" refer to the member and "we" and "us" refer to Heartland Federal Credit Union. 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 to 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.

{ Signatures } Signature(s) required for application processing.

X _____
Primary Owner's Signature and Certification **Date**

X _____
Joint Owner's Signature and Certification **Date**

Please enclose a legible photo copy of your current driver's license for identity verification. Proof of ID is now a federal requirement under the Patriot ACT.

FOR INTERNAL USE ONLY		Received ____/____/____
Member Number _____		
Sold by (#) _____	Processed by (#) _____	
Account Change? Please explain _____		