



Unwavering personal service.

Membership Application

Initial Deposit: All new members must open up a personal savings account with a minimum opening balance of \$5.00.

Disclosures: The Federal Government requires that Truth in Savings Disclosures are made available to you when you open up an account. You may print these disclosures for your records

For Additional Savings Accounts:

Please choose a savings account below.

- Holiday Club Account (Please note a minimum of \$5.00 is needed to open up for all Club Accounts)
- Vacation Club Account
- All Purpose Club Account
- Traditional Money Market Account (minimum deposit of \$2,500)
- Premium Money Market Account (minimum deposit of \$25,000)

For Personal Checking Account:

What type of Checking Account would you like to apply for? Choose One.

- Totally Free Checking
- Liberty Checking
- Flagship Checking
- Totally "e" Checking
- Freedom Account (Under 21 Package)

Master Money Check Card

- Yes, I would like a Master Money Check Card (you must have a checking account in order to use your debit card at a point of purchase terminal)
- I already am a member and have a checking account.
- I am already a member and have only a savings account. (you will only be able to access this account at ATM machines, not point of purchase, see above note).
- I am applying for membership and a checking account and would like the Master Money Check Card included.

Share and IRA Certificates

- | | | |
|--|-----------------|---------|
| <input type="checkbox"/> 91 day Share Certificate | ___ Traditional | ___ IRA |
| <input type="checkbox"/> 6-month Share Certificate | ___ Traditional | ___ IRA |
| <input type="checkbox"/> 9 month Share Certificate | ___ Traditional | ___ IRA |
| <input type="checkbox"/> 1 year Share Certificate | ___ Traditional | ___ IRA |
| <input type="checkbox"/> 2 year Share Certificate | ___ Traditional | ___ IRA |
| <input type="checkbox"/> 3 year Share Certificate | ___ Traditional | ___ IRA |
| <input type="checkbox"/> 4 year Share Certificate | ___ Traditional | ___ IRA |
| <input type="checkbox"/> 5 year Share Certificate | ___ Traditional | ___ IRA |

Will this be individual or joint account?

- Individual
- Joint

Are you presently a member of The NationsHeritage Federal Credit Union?

Yes

No

If yes, please provide your Account Number _____

Primary Applicant Information:

Legal First Name, Middle Initial, Last Name: _____

Street Address: _____

City/Town/State: _____

Mailing Address if Different: _____

Zip Code: _____

Home Telephone Number _____

Business Telephone Number: _____

E-Mail address: _____

Occupation: _____

Social Security Number: _____

Mother's Maiden Name: _____

Joint Member Application (complete only if this is to be a joint account).

Legal First Name, Middle Initial, Last Name: _____

Street Address: _____

City/Town/State: _____

Mailing Address if Different: _____

Zip Code: _____

Home Telephone Number _____

Business Telephone Number: _____

E-Mail address: _____

Occupation: _____

Social Security Number: _____

Mother's Maiden Name: _____

If you are opening more than one account then you need to indicate what your initial deposit will be for each additional account. If you are making an initial deposit by check, make the check payable to: NationsHeritage Federal Credit Union for account of "Your Name".

Initial Deposit for Secondary Account: _____

Acknowledgements/Certifications

Under penalties of perjury, I (We) 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 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 US person (including a US resident alien).*

By signing below, I (We) agree to the terms and conditions of the Membership and Account Agreement Truth-In-Savings Rate and Fee Schedule, Funds Availability Policy Disclosure, if applicable, and to the amendments the Credit Union makes from time to time. If an access card or EFT service is requested and provided (Master Money Debit) I (we) agree to the terms and acknowledge receipt of the Electronic Funds Transfer Agreement.

The IRS does not require your consent to any provision of this document other than the certification required to avoid backup withholding.

Certification Instructions: Cross out item 2 above if the IRS has notified you that you are currently subject to backup withholding because you failed to report all interest and dividends on your tax return. Cross out item 3 and call the Credit Union to complete a W-8 BEN if you are not a US person.

Signatures must be notarized before your application can be processed.

Signature 1 **Date**

Signature 2 **Date**

Please send this signed and completed application, along with your initial deposit and copies of 2 forms of un-expired identification from the lists below, one of which must be a photo id. If your Social Security number is not evident on your driver's license, please furnish valid verification of your Social Security Number.

Acceptable Photo ID

- State Driver's License with a photo and signature
- State issued Identification Card with photo (at least 60 days old)
- United States Passport
- United States Armed Forces Identification Card
- Federal Employees Issued Identification Card
- Non-resident alien registration card
- Senior citizen ID with photo
- Student ID with photo

Acceptable Second Form of ID

- Major Credit Card with valid expiration
- Temporary Drivers Licenses or Lerner's Permit
- Signed Social Security Card and Birth Certificate
- Current Utility Bill with same legal name and address as requested for the account (gas, electric, cable, telephone)

Mail To:

NationsHeritage Federal Credit Union
PO Box 779
607 Pleasant Street
Attleboro, MA 02703

Upon approval, you will receive your new account information within approximately 14 days. If opening a checking account, your checks will arrive shortly thereafter. If you have any questions, please call us at 1-800-325-8428.

Thank you for choosing NationsHeritage as your financial partner.