



## Add or Remove Joint Account Owner(s)

Primary Account Holder \_\_\_\_\_ Account Number \_\_\_\_\_

In order to add or remove a joint account holder, please complete the applicable section below – both the primary and joint members must sign below\* (in order to make the requested changes.)

\*Refer to Section 3.A in the Membership and Account Agreement for more information.

### ▶ Complete this section to **ADD a Joint Accountholder**

Joint Member Name \_\_\_\_\_

Address/City/State/Zip \_\_\_\_\_

Social Security # \_\_\_\_\_ Date of Birth \_\_\_\_\_

Valid ID # \_\_\_\_\_ ID Type \_\_\_\_\_

Issue Date \_\_\_\_\_ Exp. Date \_\_\_\_\_

Home Phone ( ) \_\_\_\_\_ Work Phone ( ) \_\_\_\_\_

Mobile Phone ( ) \_\_\_\_\_ Mother's Maiden Name \_\_\_\_\_

**Things to consider when adding a joint member** (checking "Yes" will initiate an order):

Would you like to order a Visa Check Card for the new joint member?  Yes  No

Should new checks be re-ordered to include the new joint member?  Yes  No

### ▶ Complete this section to **REMOVE a Joint Accountholder**

Joint Member Name \_\_\_\_\_

**Things to consider when removing a joint member** (if any of the following items need to be addressed, please let a Qualstar representative know):

- Are there any automatic transactions in the joint member's name? (If so, you will need to cancel/update them.)
- Do you have any checks with the joint owner's name? (If so, you will need to shred them.)
- Do you need to re-order checks?
- Do you need to change the overdraft protection on your account?
- Is the joint member also joint on any loans (on this account or another account)?
- Does the joint member have access to online services with login/password info.? (This applies to Mobile & Home Banking, and Bill Payer.)

**By signing below, you acknowledge and agree to the terms and conditions:**

1. Contained in this and any previously executed change form, membership application or enrollment forms;
2. Of the Membership and Account Agreements and Account Disclosure, all as amended to date; and
3. That issuance of each ATM and/or Check Card or other access device selected in the "Add or Remove Joint Account Owner" section is specifically requested.

\_\_\_\_\_  
Primary Member Signature Date

\_\_\_\_\_  
Joint Member Signature Date

\_\_\_\_\_  
Joint Member Signature Date