



Account Change Application & Signature Card

I'd like to open a:

Switch me to a:

- Freedom Checking*
- Classic Checking*
- Premier Checking*

Sign me up for:

- Free E-Statements (required with Freedom Checking)
- Penny On-Line Bill Pay (free with a Freedom Checking or \$5/month)

I'd like to open a(n):

- Vacation or Holiday Savings
 - SmartStart Savings
 - Money Market Account
 - Indiv. Retirement Account (IRA)
 - Certificates of Deposit (CD)
- See Rate & Fee Schedule for complete account summaries & interest rates. *Starter checks will not be sent by mail.

Return checklist

- Completed application
- Proof of identity
copy of driver's license or passport
- Proof of eligibility
copy of employer ID card or paystub
- Minimum deposits
- W-8BEN (if required)

Please return application to:

Penn State Federal Tellers
1937 North Atherton Street
State College PA 16803

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 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.

OFFICE USE ONLY	VER 05.08
MEMBER NUMBER	
SHARES OPENED	MICR NUMBER
OPEN DATE	
CHANGED BY	CHECKED BY
<input type="radio"/> W-8BEN? <input type="radio"/> SALARY DEPOSIT? <input type="radio"/> DEPOSIT AUTHORIZATION? <input type="radio"/> PAYROLL DISTRIBUTION?	

ACCOUNT NUMBER	
PRIMARY OWNER'S FIRST, MIDDLE AND LAST NAME <input type="radio"/> MR. <input type="radio"/> MRS. <input type="radio"/> MS. <input type="radio"/> DR.	
SOCIAL SECURITY NUMBER	DATE OF BIRTH
PSU ID #	MOTHER'S MAIDEN NAME
NAME CHANGE? <input type="radio"/> MARRIAGE <input type="radio"/> DIVORCE <input type="radio"/> OTHER PRIMARY OWNER NAME CHANGE REQUIRES COPY OF COURT ORDER; ORDER A NEW CARD AND GIVE NEW SIGNATURE BELOW	
MAILING ADDRESS (STUDENTS - LOCAL ADDRESS)	
PERMANENT ADDRESS IF DIFFERENT FROM ABOVE	
HOME PHONE	
CELL PHONE	WORK PHONE
EMAIL ADDRESS	
EMPLOYER, DEPARTMENT & POSITION	
DRIVER'S LICENSE NUMBER & STATE	
NEW CARD ORDER <input type="radio"/> VISA DEBIT CARD <input type="radio"/> ATM CARD	
EXPECTED PSU GRADUATION (MONTH & YEAR)	



ADD JOINT OWNER (RIGHTS OF SURVIVORSHIP APPLY)

JOINT OWNER'S FIRST, MIDDLE, AND LAST NAME <input type="radio"/> MR. <input type="radio"/> MRS. <input type="radio"/> MS. <input type="radio"/> DR.	
SOCIAL SECURITY NUMBER	DATE OF BIRTH
PSU ID #	MOTHER'S MAIDEN NAME
MAILING ADDRESS (STUDENTS - LOCAL ADDRESS)	
PERMANENT ADDRESS IF DIFFERENT FROM ABOVE	
HOME PHONE	
CELL PHONE	WORK PHONE
EMAIL ADDRESS	
EMPLOYER, DEPARTMENT & POSITION	
DRIVER'S LICENSE NUMBER & STATE	
NEW CARD ORDER <input type="radio"/> VISA DEBIT CARD <input type="radio"/> ATM CARD	
EXPECTED PSU GRADUATION (MONTH & YEAR)	

By signing below, I (We) acknowledge receipt of and agree to the terms and conditions of the Membership & Account Agreement, Truth-in-Savings, Rate & Fee Schedule, Funds Availability Policy Disclosure, to debit card or EFT service (if applicable) and to any amendment Penn State Federal makes from time to time, which are incorporated herein. In considering your request for any service, Penn State Federal may obtain a credit report. Please photocopy this page to submit additional joint owner information.

Notice-Statutory Lien Under Penn State Federal Bylaws and the Federal Credit Union Act (12USC Section 1757 (11)), Penn State Federal (we) has the right to impress and enforce a statutory lien against your shares and dividends in the event of your failure to satisfy a financial obligation to us. We may enforce that right by applying the balance of shares and dividends in the event of your failure to satisfy a financial obligation to us. We may enforce that right by applying the balance of Shares and dividends in your account(s) at the time of that default in order to satisfy your obligation. We may exercise this right without further notice to you. However, shares that you have in any account that would lose special tax treatment under any law, if subject to this interest, are excluded from this interest.

Taxpayer identification number and backup withholding certification Under penalties of perjury I 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 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. Person (Including a U.S. Resident Alien). Instructions - Cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return, cross out item 3 and complete a W-8BEN if you are not a U.S. person. **The Internal Revenue Service does not require your consent to any provision of this document other than the certification required to avoid backup withholding.**

PRIMARY APPLICANT SIGNATURE & DATE

JOINT APPLICANT SIGNATURE & DATE

Name changes & new owners require a new, original signature, so stop by or mail this in. No new signature? Please fax to (814) 863-6183.

REMOVE ACCOUNT OWNER
All account owners understand that the removal of a multiple party Account Owner requires signature of all owners & we hold Penn State Federal harmless for actions regarding account access. The removal of an owner relinquishes ownership interest including any member share in the account. This relinquishment does not affect my/our obligation on any loan account. (Fill out name to be removed & give signatures.)

ACCOUNT OWNER NAME TO REMOVE

REMOVED ACCOUNT OWNER SIGNATURE AND DATE

