

State Farm Federal Credit Union ACCOUNT MAINTENANCE WORKSHEET

Select All that Apply: Add Joint Owner Add Beneficiary Change Beneficiary
 Change of Address Change of Email Address Name Change

- Identification is required for joint owners. Acceptable forms of identification include: an unexpired driver's license, state id, or passport. If the joint owner is not appearing in person, additional identification will be required prior to account the account maintenance such as: Employer id, utility bill, credit card bill, insurance card, birth certificate.
- You will be given/sent an Account Card, Membership and Services Application for signature(s).

PRIMARY MEMBER INFORMATION – Required Member Number

Name **NEW Name**

Social Security or Tax ID Number - - Email Address

Is this a new email? Yes No Do you use E-Statements? Yes No

CHANGE OF ADDRESS

Effective Date / / Residential Mailing Alternate Address

Do you have an IRA account? Yes No Does this address apply to all joint owners? Yes No

Previous Address

City State Zip Phone - -

New Address

City State Zip Phone - -

ADDITIONAL ACCOUNTS TO CHANGE

Name Member Number

Name Member Number

Name Member Number

Member Signature: _____ Date: _____

JOINT OWNER INFORMATION

Name

Social Security or Tax ID Number - - Date of Birth / /

Street Address

City State Zip Length of Occupancy yrs mths

Work Phone - - Home Phone - - Cell - -

Email Address

Membership Eligibility Agent Employee Agent Family Employee Family Retiree

Drivers License or Other Gov't ID # State of Issue

Date of Issue / / Expiration Date / /

Dept./Work Location/Agent Code Hire/Seniority Date / /

Occupation (non State Farm Associate Only)

BENEFICIARY *(Beneficiary cannot be a joint owner)*

Name Relationship
Address
City State Zip
Social Security Number - - Date of Birth / /

Name Relationship
Address
City State Zip
Social Security Number - - Date of Birth / /
