



Add or Remove Joint Account Holders

Use this form to add or remove Joint Account Holders from one or more consumer deposit accounts.

- To remove Joint Account Holders, only the Primary Account Holder or a Joint removing themselves must sign. To add Joint Account Holders, all new and existing account holders must sign.
- All signers must provide full name and Social Security number, and complete the Employment Status, Employer, and Occupation section.
- Account holders under age 18 require the signature of a parent or guardian who is on the account.

Please allow 10 business days to process your request upon BECU receipt.

Step 1. Your information

Full Name	Date of Birth	SSN/TIN (9 digits)
Employment Status <input type="radio"/> Employed <input type="radio"/> Self-employed <input type="radio"/> Retired <input type="radio"/> Unemployed <input type="radio"/> Never Employed		
Employer (current or previous if not employed)	Occupation (current or previous if not employed)	

I am the ☐ Primary Account Holder ☐ Joint Account Holder (see below)

If you are a Joint Account Holder removing yourself, provide the Primary Account Holder's name and Social Security number below, complete Steps 3 and 4, and sign.

Step 2. Primary Account Holder information

Full Name	Date of Birth	SSN/TIN (9 digits)	
Street Address			
City	State/Province	ZIP/Postal Code	Country
Email Address	Phone	Phone type <input type="radio"/> Home <input type="radio"/> Mobile	
ID Type	Issue Date	Expiration Date	
ID Number	State Issued	Country Issued	

Step 3. What would you like to do?

☐ Add Joint Account Holders ☐ Remove Joint Account Holders ☐ Remove myself

Step 4. Update the following accounts

To add a new Joint Account Holder, all accounts listed must have the same Primary and Joint Account Holders. Use a separate form for accounts with different account holders.

- ☐ Apply to all deposit accounts currently open.
- ☐ Apply only to specific deposit accounts below:

Account Number (10 digits)	Account Number (10 digits)	Account Number (10 digits)
Account Number (10 digits)	Account Number (10 digits)	Account Number (10 digits)

Step 5. Remove Joint Account Holders

Full Name	Date of Birth	SSN/TIN (9 digits)
Full Name	Date of Birth	SSN/TIN (9 digits)
Full Name	Date of Birth	SSN/TIN (9 digits)

Step 6. Add Joint Account Holders

Choose account ownership type. See the *BECU Account Agreements* for more details; before making a selection, discuss with your legal counsel or financial planner.

- ☐ **Joint with Right of Survivorship (JWRS):** Upon the death of any account holder, that person's interest in the account(s) becomes the property of the surviving account holder(s).
- ☐ **Joint without Right of Survivorship (JWORS):** Upon the death of any account holder, that person's interest in the account(s) becomes the property of the beneficiary (Payable on Death designees) or to be claimed according to applicable state law.
- I understand that upon my death, my percentage of ownership of these accounts will be frozen and pass to any beneficiaries or be claimed according to applicable state law.
 - If JWORS percentages are not specified, each owner will have an equal percentage of ownership. When specifying JWORS percentages, they must total to 100%.

Primary Account Holder's designated percentage for JWORS: _____%

Joint Account Holder A details

☐ New Joint Account Holder (Complete all information) ☐ Existing Joint Account Holder

First Name	Middle Name	Last Name	
Date of Birth (mm/dd/yyyy)	SSN/TIN (9 digits)	Mother's Maiden Name	
Street Address			
City	State/Province	ZIP/Postal Code	Country
Mailing Address (if different than above)			
City	State/Province	ZIP/Postal Code	Country
Email Address	Phone	Phone type <input type="radio"/> Home <input type="radio"/> Mobile	
ID Type	Issue Date	Expiration Date	
ID Number	State Issued	Country Issued	
Employment Status <input type="radio"/> Employed <input type="radio"/> Self-employed <input type="radio"/> Retired <input type="radio"/> Unemployed <input type="radio"/> Never Employed			
Employer (current or previous if not employed)	Occupation (current or previous if not employed)		
Joint Account Holder's designated percentage for JWORS %			

☐ Issue a new debit card?

Debit Card Design

☐ Basic Red ☐ Seahawks ☐ KEXP ☐ UW Gold ☐ WSU Red

To learn more about BECU debit cards, visit becu.org/debit.

Joint Account Holder B details

☐ New Joint Account Holder (Complete all information) ☐ Existing Joint Account Holder

First Name	Middle Name	Last Name	
Date of Birth (mm/dd/yyyy)	SSN/TIN (9 digits)	Mother's Maiden Name	
Street Address			
City	State/Province	ZIP/Postal Code	Country
Mailing Address (if different than above)			
City	State/Province	ZIP/Postal Code	Country
Email Address	Phone	Phone type <input type="radio"/> Home <input type="radio"/> Mobile	
ID Type	Issue Date	Expiration Date	
ID Number	State Issued	Country Issued	
Employment Status <input type="radio"/> Employed <input type="radio"/> Self-employed <input type="radio"/> Retired <input type="radio"/> Unemployed <input type="radio"/> Never Employed			
Employer (current or previous if not employed)	Occupation (current or previous if not employed)		
Joint Account Holder's designated percentage for JWORS %			

☐ Issue a new debit card?

Debit Card Design

☐ Basic Red ☐ Seahawks ☐ KEXP ☐ UW Gold ☐ WSU Red

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Joint Account Holder C details

☐ New Joint Account Holder (Complete all information) ☐ Existing Joint Account Holder

First Name	Middle Name	Last Name	
Date of Birth (mm/dd/yyyy)	SSN/TIN (9 digits)	Mother's Maiden Name	
Street Address			
City	State/Province	ZIP/Postal Code	Country
Mailing Address (if different than above)			
City	State/Province	ZIP/Postal Code	Country
Email Address	Phone	Phone type <input type="radio"/> Home <input type="radio"/> Mobile	
ID Type	Issue Date	Expiration Date	
ID Number	State Issued	Country Issued	
Employment Status <input type="radio"/> Employed <input type="radio"/> Self-employed <input type="radio"/> Retired <input type="radio"/> Unemployed <input type="radio"/> Never Employed			
Employer (current or previous if not employed)	Occupation (current or previous if not employed)		
Joint Account Holder's designated percentage for JWORS %			

☐ Issue a new debit card?

Debit Card Design <input type="radio"/> Basic Red <input type="radio"/> Seahawks <input type="radio"/> KEXP <input type="radio"/> UW Gold <input type="radio"/> WSU Red
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To learn more about BECU debit cards, visit becu.org/debit.

Step 6. Agreements

1. Acknowledgment. You have received, read, understood, and agree to all of the terms and conditions contained in the following Boeing Employees' Credit Union agreements and disclosures, all as amended to date and all of which you will retain for your records:

- [BECU Consumer Account Disclosure](#)
- [U.S. Consumer Privacy Notice](#)
- [BECU Account Agreements](#)

2. Request ATM or Debit Card. By selecting a Debit Card above, you expressly request BECU to issue such Debit Card to you.

3. Request Checks. By requesting checks, you authorize BECU to debit the cost of the checks from your Checking Account at the time of the check order.

4. Joint and Primary Requests. BECU may accept any order and instruction regarding the account(s) and any request for future services from the Primary or any Joint Account Holder(s) without the consent of or notice to the other Account Holder(s). The Joint Account Holder will have ownership interest in, and legal liability for, a jointly held account.

5. Consumer Reports. BECU may make inquiries necessary to evaluate your applications and to conduct periodic reviews of your BECU accounts, including ordering a credit report, and you instruct BECU to obtain and use such information in determining to notify you about other products and services. You agree that we may tell others about our credit experience with you and may report information about your accounts to credit bureaus. Late payments, missed payments, or other defaults on your accounts may be reflected in your credit report.

6. Privacy Notice. All of the credit or other information concerning you that BECU may obtain now or in the future will be compiled, stored, and used in accordance with BECU's Privacy Notice as amended from time to time.

7. Marketing. By providing your email address, you agree that BECU may send marketing material to you electronically.

8. Telephone Consumer Protection Act. BECU and its service providers may contact you for non-marketing purposes at any telephone number you provide. BECU may use automated telephone dialing, text messaging systems, and electronic mail to contact you. The telephone messages are played by a machine automatically when the telephone is answered and may be recorded by your answering machine. Standard data and message rates may apply, and you agree that BECU will not be liable for such fees. You agree to update us promptly when your telephone number changes. At any time, you may update such information or revoke your consent to receive non-emergency calls or text messages at a telephone number assigned to a wireless device (or any service that charges on a per-call basis) by contacting us at 800-233-2328 or other reasonable means.

9. Existing Beneficiaries. You understand and agree that any preexisting beneficiary designations on the account(s) will remain in effect, and you understand that a Designate Beneficiaries form must be completed to change any beneficiary designations.

Step 7. Acknowledgment

By signing below, I certify that I have read, understand, and agree with the above Agreements. Further, I personally verified and confirmed that all information provided and displayed in this form is accurate, complete, true, and submitted for the purpose selected above. I understand that BECU will rely on such information in BECU's dealings with me.

Signature	Printed Name	Date (mm/dd/yyyy)
Signature	Printed Name	Date (mm/dd/yyyy)
Signature	Printed Name	Date (mm/dd/yyyy)
Signature	Printed Name	Date (mm/dd/yyyy)

If submitting this form via mail, please return all pages of the completed and signed form to:
BECU

Attn: Account Servicing, M/S 1094-2
P.O. Box 97050
Seattle, WA 98124-9750