



ST. JAMES PARISH CREDIT UNION
 6195 Cheviot Road / Cincinnati, OH 45247
 Memberline: (513) 385-5921



WWW.STJPCU.COM

**ST. JAMES CREDIT UNION
 INSTRUCTIONS**

Account Type: Share/Savings **PANTHER SAVER**

ALREADY A PANTHER SAVER? Provide account number and new home room information only!
NEW MEMBER? Fill in Homeroom only.
 Account number will be assigned by credit union.

Account No. Information	
<input type="checkbox"/> New Acct _____	
<input type="checkbox"/> Existing # _____	
Home Room _____	

A. ACCOUNT OWNERSHIP – Select one/See back for details...NEW PANTHER SAVERS ONLY!

- INDIVIDUAL (STUDENT NAME ONLY)**
Deposit and withdrawal rights. ←
- JOINT WITH SURVIVORSHIP***
Equal ownership and deposit and withdrawal rights. ←
- HAVE CREDIT UNION CALL ME TO DISCUSS OTHER TYPES OF OWNERSHIP** ←

B. MEMBER APPLICATION – Fill in all information. Please print.

Name 1 - Student Name	Social Security No.	Date of Birth
Street	City/State	Zip
Home Phone Number	Mother's Maiden Name	Year of Graduation from St. James
Name 2 - Joint Owner/Authorized Signer*	Social Security No.	Date of Birth
Name 3 - Joint Owner*	Social Security No.	Date of Birth

C. TIN CERTIFICATION AND BACKUP WITHHOLDING INFORMATION

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)

Certification 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-8 BEN if you are not a U.S. person.

D. AUTHORIZATION - Signatures required

By signing below, I/we agree to the terms and conditions of the Membership and Account Agreement, the Truth-in-Savings Rate and Fee Schedule, Funds Availability Policy Disclosure, if applicable and to any amendments the Credit Union makes from time to time, which are incorporated herein. I/we acknowledge receipt of a copy of the Agreement and Disclosures applicable to the accounts and services requested herein. **The IRS does not require your consent to any provision on this document other than the certifications required to avoid backup withholding.**

PANTHER Saver Member Signature	X	Date
Joint/Authorized Member Signature	X	Date
Joint/Authorized Member Signature	X	Date

ATTENTION EXISTING PANTHER SAVERS

Complete existing account number and homeroom only. Return form.

ATTENTION NEW PANTHER SAVERS

This form must be completed and returned. An account number will be issued at that time.

Section A: OWNERSHIP (Select ONE)

Select a form of ownership for the account. Your child's name should appear as Name 1 regardless of the ownership selected. Most common is "JOINT WITH SURVIVORSHIP" – naming one or two parents as joint owners. Call the credit union for other types of ownerships available.

Section B: MEMBER APPLICATION

Complete the information for all owners/authorized signers of the account. **Provide year of graduation for your child.**

Section C: CERTIFICATION/TIN

Read this section carefully and if conditions apply, as described, take action as directed in this section.

Section D: SIGNATURES

Provide signatures of each individual named in the "Member Application" section on the respective name lines.

If you have any questions in completing the application, or have questions regarding accounts and services provided by St. James Parish Credit Union, please contact:

*Millie Nie, PANTHER Saver Coordinator
 385-5921*

ADDITIONAL INFORMATION REQUESTED:

CHECK BELOW IF YOU WOULD LIKE ADDITIONAL INFORMATION SENT TO YOU REGARDING A COVERDELL EDUCATION IRA ACCOUNT FOR YOUR CHILD.

YES, I'D LIKE EDUCATION IRA INFO MAILED.

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Visit our website for more information on PANTHER Saver Program and other savings/loan products for your family!