

Membership Application



- **Membership in Sunmark requires a \$5 opening deposit to savings for each joint owner.**
- **Photocopy of current driver's license or valid photo ID is required.**

Account Number _____
 New Account Change (Type: _____)

Account Type (Check all that apply)

- | | |
|---|---|
| <input type="checkbox"/> Joint Owner – JO | <input type="checkbox"/> Represented Payee – RP |
| <input type="checkbox"/> Beneficiary – BE | <input type="checkbox"/> Administrator – AD |
| <input type="checkbox"/> Custodian – CU | <input type="checkbox"/> Executor – EX |
| <input type="checkbox"/> Power of Attorney – PA | <input type="checkbox"/> Trustee – TR |
| <input type="checkbox"/> Other _____ | |

| Section 1: PRIMARY ACCOUNTHOLDER INFORMATION | | |
|--|-----------------------------|------------------------|
| LAST NAME & SUFFIX (i.e. Jr., III) | FIRST NAME & MIDDLE INITIAL | SOCIAL SECURITY NUMBER |
| STREET ADDRESS (NO P.O. BOXES) | CITY | STATE & ZIP |
| MAILING ADDRESS (IF DIFFERENT) | CITY | STATE & ZIP |
| HOME PHONE NUMBER | WORK PHONE NUMBER | CELL PHONE NUMBER |
| DRIVER'S LICENSE NUMBER / STATE | DATE OF BIRTH | MOTHER'S MAIDEN NAME |
| E-MAIL ADDRESS | OCCUPATION | EMPLOYER |

| Section 2: ASSOCIATE ACCOUNTHOLDER INFORMATION | | |
|--|-----------------------------|------------------------|
| LAST NAME & SUFFIX (i.e. Jr., III) | FIRST NAME & MIDDLE INITIAL | SOCIAL SECURITY NUMBER |
| STREET ADDRESS (NO P.O. BOXES) | CITY | STATE & ZIP |
| MAILING ADDRESS (IF DIFFERENT) | CITY | STATE & ZIP |
| HOME PHONE NUMBER | WORK PHONE NUMBER | CELL PHONE NUMBER |
| DRIVER'S LICENSE NUMBER / STATE | DATE OF BIRTH | MOTHER'S MAIDEN NAME |
| E-MAIL ADDRESS | OCCUPATION | EMPLOYER |

| Section 3: ACCOUNTS & SERVICES OPTIONS (Can be completed with a Sunmark representative) | | | |
|---|--|--|--|
| <p>Savings</p> <input type="checkbox"/> Savings Plan <input type="checkbox"/> Money Market <input type="checkbox"/> Moola Moola Kids Club <input type="checkbox"/> Certificates <input type="checkbox"/> Young Adult Savings Plan <input type="checkbox"/> IRA* (req. TAP app) <input type="checkbox"/> Silver Savings Plan <input type="checkbox"/> Special Event Savings Plan <input type="checkbox"/> Holiday Savings Plan | <p>Checking</p> <input type="checkbox"/> Free Checking <input type="checkbox"/> Earnings Checking <input type="checkbox"/> Earnings Plus Checking <input type="checkbox"/> Silver Checking <input type="checkbox"/> Overdraft Privilege (ATM/Debit Card) <input type="checkbox"/> Student Checking | <p>Free Services</p> <input type="checkbox"/> Debit Card J1 / J2 <input type="checkbox"/> Online Banking & BillPay <input type="checkbox"/> eStatements <input type="checkbox"/> Paper Statements <input type="checkbox"/> Review of Credit <input type="checkbox"/> TAMI Pin Delivery: In Person / Phone | <p>Other Services</p> <input type="checkbox"/> Insurance* Auto / Home / Renters <input type="checkbox"/> Benefits Plus <p>Loans*</p> <input type="checkbox"/> Mortgage <input type="checkbox"/> Home Equity <input type="checkbox"/> Vehicle <input type="checkbox"/> Personal <input type="checkbox"/> Overdraft Line of Credit <p><small>*Additional forms may apply.</small></p> |

| Section 4: MEMBER COMMUNICATIONS |
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| <p>Sunmark periodically sends member alerts, announcements and information regarding your account by mail, phone and e-mail in the event we need to contact you regarding the status of your account. This will assure that you receive timely alerts of any account changes or an interruption of normal service.</p> <p>Please note: In the event we suspect fraudulent activity on your account, Sunmark may attempt to contact you by phone to verify information. However, we will never ask you for secure information, like your PIN or password, in any outbound communication.</p> <p>By checking the below box, I am indicating my preference to have Sunmark contact me by the following method(s) regarding service interruptions, questionable activity or other important notifications about my account. If I choose telephone as a means of communication, I understand that Sunmark may leave a message on voicemail or in person in reference to any items that may assist in providing communication to me about my account. I understand that although I indicate preferred modes of communication, Sunmark may contact me through non-preferred channels. I acknowledge that it is my responsibility to keep account information updated and that, if at any time I wish to change my communication methods, I will be required to notify Sunmark immediately in writing. Until such time, Sunmark will not be held liable for communicating with me as indicated below.</p> <p>My preferred methods of communication are: <input type="checkbox"/> Phone <input type="checkbox"/> E-mail <input type="checkbox"/> Mail</p> |



CONTINUED ON BACK

