

## CHANGE OF PERSONAL ACCOUNT OWNERSHIP ADDING ACCOUNT OWNER(S)

Please complete online, print, and sign this form. \* Mandatory fields.

### 1 - EXISTING ACCOUNT OWNER(S) - List all current owners of the account(s) you want to change.

*First Name	*Middle Name	*Last Name	*Member #
*First Name	*Middle Name	*Last Name	*Member #
*First Name	*Middle Name	*Last Name	*Member #
*First Name	*Middle Name	*Last Name	*Member #

You can find your Member # (Membership) on your online banking page under Account Summary.

### 2 - NEW ACCOUNT OWNER(S) - List all new people who you would like added to the account(s).

**Note:** All person(s) noted in this section **MUST** be existing member(s) of Outlook Financial. If one or more person(s) are not existing member(s), they can use the 'Join' link on the Outlook Financial website and fill out the member application form.

*First Name	*Middle Name	*Last Name	*Member #
*First Name	*Middle Name	*Last Name	*Member #
*First Name	*Middle Name	*Last Name	*Member #
*First Name	*Middle Name	*Last Name	*Member #

### 3 - ACCOUNT OWNERSHIP CHANGES - List all account numbers you would like to add the new account owner(s) in section 2 to.

Account Number	Account Number
Account Number	Account Number
Account Number	Account Number

Account number(s) can be found on your statement or on your online banking page under View e-Statements.

### 4 - AUTHORIZATION FOR ACCOUNT OWNERSHIP CHANGES

I/we request that the Outlook Financial member(s) list in section 2 be added as joint owner(s) to the account number(s) listed in section 3.

#### By signing the form below, I/we hereby understand and agree to the following:

- I/we have read and agree to the terms and conditions outlined in the current Member Account Agreement, located on our website.
- By making the above noted account(s) in section 3 joint, the account(s) will automatically become joint with right of survivorship. All obligations under this Account Agreement will be joint obligations, including the obligation to pay any overdrafts and the obligation to pay interest, fees, and charges.
- Outlook Financial reserves the right to reject or further investigate this request to make these account(s) joint.

**All existing and new account owners MUST sign this section.**

Member Name (Please Print)	Member Signature	Date (DD/MM/YYYY)
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