

Account Types: Savings HSA Checking HSA Debit Card

IMPORTANT INFORMATION ABOUT PROCEDURES FOR OPENING A NEW ACCOUNT: To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify and record information that on personal accounts identifies each person who opens an account. In addition, on legal entity accounts, we will require identification on beneficial owners and controlling person.

What this means for you: When you open an account, we will ask for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents.

Type of Health Insurance Plan Coverage:

Single Family

Special Note: If you would like to add an Authorized Agent to transact on this account see the HSA Agent Authorization Form.

Eligibility for Membership: _____

Primary Accountholder Information

Name: _____	Driver's License/Gov't ID #: _____
Address _____	State Issued: _____
City, ST, Zip: _____	Issue Date: _____
Social Security: _____	Exp Date: _____
Birth Date: _____	How did you hear about COPFCU?
Email Address: _____	<input type="checkbox"/> Employer <input type="checkbox"/> Coworker
Mobile Phone: _____	<input type="checkbox"/> Family Member <input type="checkbox"/> COPFCU Visit
Home Phone: _____	<input type="checkbox"/> Other: _____

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 (or I am waiting for a number to be issued to me) and
- 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 withholdings 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. You must cross out item 2 if you have been notified by the IRS that you are currently subject to backup withholding because you failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secure property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN.

AUTHORIZATION

By signing below, I agree to the terms of the Membership and Account Agreement, Truth-in-Savings Rate and Fee Schedule, E-Sign Act, Funds Availability Policy Disclosure, if applicable, and to any amendment the Credit Union makes from time to time which are incorporated herein. I acknowledge receipt of a copy of the Agreement and Disclosures applicable to the accounts and services requested herein. If an access card or EFT service is requested and provided, I agree to the terms of and acknowledge receipt of the Electronic Funds Transfer Agreement. The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

Signature

Date

For Credit Union Use Only

OFAC HSA Checking \$5 Deposit
 Membership _____ Primary DC _____ Checks Ordered