



Rgceug'Rt qxlk g'vj g'Hqny lpi 'Kphqo cvkqp''
For Details or Assistance, call (202) 224-2967 or 1-(800) 374-2758.

O go dgt uj k' 'Kphqo cvkqp''

[qw'y qwf 'Hng' [] Open a New Deposit Account
vq'z'' [] Change information on an existing account (doing so supercedes any other information on file for this account)

Pco g'Ncu'HHk u'YO K'Rgceug'Rt lpi'	O go dgt 'P wo dgt''	J qo g'G'O chlCff t'gn'
"	"	"

Ej genlpi 'Ceeqwpv'Qr v'kpu

<p>Ej qqg' qwt 'Ej genlpi 'Ceeqwpv'epf 'Qxgft tch/Rt qvgevkp<'</p> <p>]"_Ugpcvg'Ej genlpi 'Ceeqwpv'Ugpcvg'Ej genlEctf "</p> <p>Checking with no annual fees, no check limits and no minimum balance. Free USSFCU ATM withdrawals. No credit union fee for up to four non-USSFCU ATM withdrawals per month (\$1.00 each thereafter). One free box of Senate style checks (150) per year.</p>	<p>Qr gplpi 'Dc:peg<'</p> <p>\$_____ transfer from</p> <p>USSFCU account # _____</p> <p>\$_____ check enclosed</p>	<p>Rgceug'igniluj qy '{ qw'y qwf 'Hng'vq'j' c'xg' qwt 'Ej genlpi t'lv'v'f <'</p> <p>[] Order checks Starting Number on checks: _____ (default = 101)</p> <p>[] Joint Owner #1 Name on Checks [] Joint Owner #2 Name on Checks [] Print Home Phone Number on Checks [] Print Social Security Number _____-_____-_____</p>
<p>]"_I qf 'Uqwt'eg'Ej genlpi 'Ceeqwpv'II qf 'Ej genlEctf "</p> <p>Premium checking earns dividends (for all balances) and rebates for Gold Card purchases, along with all the benefits of VISA Gold. No credit union ATM fees. One free box of Gold Style checks (150) per year.</p>	<p>Qr gplpi 'Dc:peg<'\$3,222'b lpio wo +'</p> <p>\$_____ transfer from</p> <p>USSFCU account # _____</p> <p>\$_____ check enclosed</p>	<p>Rgceug'igv'bu'hpqy 'y j gj g't '{ qw'y luj 'vq'j' c'xg' CVO 'TF gdlv'Ectf "</p> <p>ceegur'vq' qwt 'ceeqwpv<'"</p> <p>[] Check Card for Yourself [] Check Card for Joint Owner #1 [] Check Card for Joint Owner #2</p>
<p>]"_Gcu'Nlpg'Qxgft tch/Rt qvgevkp'c'r r'ngv'v'g'v'g'j' g't 'Ej genlpi "'</p> <p>qr v'kpu=0Overdraft protection with no annual fee.</p>	<p>Co qwpv'T gs v'gungf 'Saaaaaaaaaaaaaaaa'</p> <p>(\$100 minimum - \$500 maximum)</p>	

Ucxlpi u'Ceeqwpv'

<p>Qr gplpi 'Dc:peg'</p> <p>\$_____ transfer from USSFCU account # _____</p> <p>\$_____ check enclosed.</p>	<p>[] Additional Savings Account [] Holiday Savings Account [] Youth Savings Account"</p>
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O qpg' 'O ctngv'Ceeqwpv'

<p>Qr gplpi 'Dc:peg' \$3,222'yr gplpi 'Dc:peg't gs v'k'g' +'</p> <p>\$_____ transfer from USSFCU account # _____</p> <p>\$_____ check enclosed.</p>	<p>[] Order checks Starting Number on checks: _____ (default = 6001)</p> <p>[] Joint Owner #1 Name on Checks [] Joint Owner #2 Name on Checks"</p>
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Ugpcvg'Uo ct v'Egt v'hlcevgu'

<p>Qr gplpi 'Dc:peg' \$3,222'b lpio wo +'</p> <p>\$_____ transfer from USSFCU account # _____</p> <p>\$_____ check enclosed.</p>	<p>V{ r'g'gh'Ceeqwpv<'</p> <p>[] 3-6 month [] 36-48 month [] 6-12 month [] 48-60 month [] 12-24 month [] 60 month [] 24-36 month [] Savings</p>	<p>E'g'f k'f k'f g'p'f u'v'q:</p> <p>[] Checking a/c _____ [] Savings a/c _____ [] Certificate (compounds)</p>
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Kpf k'f wcnT gvt go gpv'Ceeqwpv'K' C+'v' t'cf k'k'p'c'rl'p'f 'T'qj' +'

<p>Vq'lr'gp't'p'K' C. 'Hn'q'w'v'j' k'v'gevkp. 't'p'f <'</p> <p>► Call 202.224.2967 or 800.374-2758 or visit a branch and speak with an MSO ► For a Traditional IRA, fill out Form CUC 2300 ► For a Roth IRA, fill out Form CUC 2400R-C</p>	<p>Vq'E'q'p't' k'dw'g'v'q'c'P'gy 'ht' 'G'z'k'p'i 'K' C. 'Hn'q'w'v'j' k'v'gevkp. 't'p'f <'</p> <p>► For a Traditional IRA, fill out Form 2315 ► For a Roth IRA, fill out Form 2415R</p>	<p>► To Transfer Funds from an existing IRA, fill out this section and complete form 2325. ► If you wish to make a direct rollover from a qualified retirement plan other than an IRA, or, if you wish to discuss SEP options, please call 800.374.2758 and ask for the IRA Department.</p>
<p>Qr gplpi 'Dc:peg' 'Ucxlpi u'?' \$3,222'b lpio wo +'</p> <p>\$_____ transfer from USSFCU account # _____</p> <p>\$_____ check enclosed.</p>	<p>V{ r'g'gh'Ceeqwpv<'</p> <p>[] 3-6 month [] 36-48 month [] 6-12 month [] 48-60 month [] 12-24 month [] 60 month [] 24-36 month [] Savings</p>	<p>Y j cv'v' r'g'gh'K' C<'</p> <p>[] Traditional [] Roth</p>

U'i pcvwt gu'

Your Signature	Date	Hqt 'Et gf k'Wig'Qp'f <'
Joint Owner #1 Signature	Date	Entered By:
Joint Owner #2 Signature	Date	Date:



Custodial Account Number	Date
Donor's Name	Donor's Account Number (if applicable)
Custodian's name	Successor Custodian's Name (if applicable)

Minor's name	Social Security Number
Birth Date	Telephone Number
Address	City State Zip

I, _____ hereby establish this custodial account in my name as custodian for _____ (name of minor) under the District of Columbia Uniform Transfers to Minors Act.

The United States Senate Federal Credit Union is hereby authorized to recognize the signature of the Custodian subscribed hereto in the payment of funds or in the transaction of any business for this Account. The donor and the custodian hereby agree with the Credit Union that all sums now paid into this Account, by any person with all accumulations thereon, are and shall be owned by the minor named on this account pursuant to the Uniform Transfers to Minors Act (Act), and shall be subject to the withdrawal or receipt of the custodian or the minor pursuant to the Act, and payment to them shall be valid and discharge said Credit Union from liability for such payment.

The right or authority of the Credit Union under this agreement shall not be changed or terminated by any person except by written notice to the Credit Union, which shall not affect transactions previously made.

Donor's Signature	Date
Custodian's Signature , Custodian	Successor Custodian's Signature (if applicable) , Custodian

SENATE CUSTODIAL ACCOUNT INFORMATION

(This is for informational purposes only and should not be interpreted as legal or tax advice)

- A. A *Senate Custodial Account* may be opened for a minor who is to be the recipient of an irrevocable monetary gift under the District of Columbia Uniform Transfer to Minors Act. Once established, funds in the account must be used for the benefit of the minor. Withdrawals from the account will always be in the form of a check made out in the name of the custodian, as Custodian for the minor. (Ex. John Doe, as Custodian for Mary Doe)
- B. When the *Senate Custodial Account* is established in the name of the custodian, the tax liability on the earnings credited to such an account rests on the minor and not on the parent, donor or custodian. The minor must have a Social Security Number. Dividends earned on the account are reported to the Internal Revenue Service according to the minor's Social Security Number.
- C. A custodian must be named on the *Senate Custodial Account*. The custodian may (but is not required to) be the donor.
- D. A successor custodian may also be named in the event of the resignation, death or legal incapacity of the custodian.
- E. The custodian controls the *Senate Custodial Account* until the minor reaches 18, or 21 if designated. At that time, the minor may request the funds in the account and the *Senate Custodial Account* must be closed. The minor may then open an account with the Credit Union if the minor is within the field of membership. If the donor intends the account to remain in effect until the minor reaches the age of 21, the donor must specifically include the parenthetical "(21)" after the words "District of Columbia Uniform Transfers to Minors Act" in your designation of this account.
- F. The Custodian controls and directs the funds in the account in a manner beneficial to the minor and has sole authority for withdrawals.
- G. Funds in a *Senate Custodial Account* may not be used as collateral on a secured loan.
- H. Senate Certificate Accounts may be established with funds from the *Senate Custodial Account*.
- I. Deposits to the *Senate Custodial Account* may be made at any time, by any available method.
- J. Establishing membership at the United States Senate Federal Credit Union requires opening an account with \$6.00 (\$5.00 to purchase one credit union share that must remain on deposit at all times to maintain membership -- plus a one-time \$1.00 membership service fee).
- K. The Credit Union is not responsible for managing or administering the custodial account and the Credit Union is not responsible for reviewing the transactions of the account for compliance with the Uniform Transfer to Minors Act.