

## Membership Application Instructions:

Thank you for your interest in becoming a Member of the Pitney Bowes Employees Federal Credit Union. Attached is our Membership Application for you to review. Please fill out the application in its entirety and sign and date the application.

Include a minimum **\$50** opening balance check made payable to **PBEFCU**, a **form of ID** (see Membership Form for specific ID requirements) and **MAIL to:**

**Pitney Bowes Employees Federal Credit Union**  
**ATTN: Member Services**  
**27 Waterview Drive (27-1A)**  
**Shelton, CT 06484**

Thank you and let us know if you have any questions or need assistance filling out the paperwork.

### **Pitney Bowes Employees Federal Credit Union**

27 Waterview Drive (27-1A)

Shelton, CT 06484

☎: 800.356.5965 | ✉: [pbefcu@pb.com](mailto:pbefcu@pb.com)

# FREE MONEY!



## The Credit Union's **Family Membership \$25 Promotion**

This coupon is worth \$25 in addition to the minimum opening balance of \$50 in the new Family Member's Savings Account. For every Family Member that joins the Credit Union, the referring Member will also receive \$25. The account must remain open for a minimum of 90 days or the bonus dollars will be forfeited. Only one coupon permitted for each new account. This is a limited time offer. Some Restrictions apply. The Credit Union may terminate this promotion at any time.

**Dear Valued Member:**

Did you know that your **Family Members** can also become a member of the Credit Union?

If your family member becomes a member of the Credit Union, **they will receive \$25** in their account once they've deposited a minimum of \$50 into their new Savings Account at Pitney Bowes Employees Federal Credit Union **PLUS you will receive \$25** for referring your Family Member!

**To begin we just need the following information:**

**Name of Family Member:** \_\_\_\_\_

**Date:** \_\_\_\_\_

### The Applicant is my...

(please check one below)

- |   |  |
|---|--|
| <input type="checkbox"/> Spouse           | <input type="checkbox"/> Aunt                  |
| <input type="checkbox"/> Child            | <input type="checkbox"/> Uncle                 |
| <input type="checkbox"/> Parent           | <input type="checkbox"/> Niece                 |
| <input type="checkbox"/> Sibling          | <input type="checkbox"/> Nephew                |
| <input type="checkbox"/> Grandparent      | <input type="checkbox"/> Stepchild             |
| <input type="checkbox"/> Grandchild       | <input type="checkbox"/> Stepsibling           |
| <input type="checkbox"/> Stepparent       | <input type="checkbox"/> Adoptive Relationship |
| <input type="checkbox"/> Household Member |  |

**I certify that the above applicant is related to me or is a household member.**

**Member Name:** \_\_\_\_\_

**Member Signature:** \_\_\_\_\_

**Member Number:** \_\_\_\_\_

(Membership Form on Back)



# Pitney Bowes Employees Federal Credit Union

## Membership/Savings/Checking Application

**Select** type of account: ☐ Savings ☐ Checking - Print both names on checks? ☐ Yes ☐ No  
 Primary Member - ☐ Employee or ☐ Family Member

<b>Member/Owner:</b>		<b>Date of Birth:</b>	
<b>Address, City, State, Zip:</b>			
<b>Soc Sec No:</b>	<b>Employer:</b>	<b>ID #:</b>	
<b>Home Phone:</b>	<b>Work Phone:</b>	<b>Mobile Phone:</b>	
<b>Driver's License No:</b>	<b>State:</b>	<b>Expiration:</b>	
<b>Email:</b>			

<b>Joint Owner:</b>		<b>Date of Birth:</b>	
<b>Address, City, State, Zip:</b>			
<b>Soc Sec No:</b>	<b>Employer:</b>	<b>ID #:</b>	
<b>Home Phone:</b>	<b>Work Phone:</b>	<b>Mobile Phone:</b>	
<b>Driver's License No:</b>	<b>State:</b>	<b>Expiration:</b>	
<b>Email:</b>			

### **Identification Requirements:**

**Only one form of ID is required if from this Primary List (Photo ID):**

- Driver's license or ID card issued by a state or possession of the United States containing a photograph (unexpired)
- U.S. Passport (unexpired or expired)
- U.S. Military ID card (unexpired)
- U.S. Military dependent's ID card (unexpired)

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 identifies each person who opens an account. 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.

**If you can't provide ID from the Primary List you must present TWO forms of ID/documentation from this Secondary List:**

- Photo ID from employer
- Foreign Passport (unexpired)
- Permanent Resident Card or Alien Registrations Receipt Card (Form I-551)
- Social Security Card issued by the Social Security Administration
- Original/Certified copy of birth certificate issued by a state, county, municipal authority, or outlying possession of the United States with official seal
- U.S. citizen ID card (Form 1-197)
- ID Card for use of Resident Citizen in the United States (Form 1-179)
- ID Card issued by federal, state or local government agencies or entities, provided it contains a photograph

**Minors (under 18 years of age) are not required to present identification since the account must be joint with a member who has presented the required identification.**

**I/We are not subject to backup withholding because (a) I/We have not been notified by the IRS that I/We are subject to backup withholding as a result of a failure to report all interest or dividends, or (b) the IRS has notified me/us that I/We are no longer subject to backup withholding. I/We are a U.S. person (including a resident alien).**

**By signing this application each of you jointly and severally agrees to the terms and conditions contained in the Membership and Account Agreement.**

**Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Signature** \_\_\_\_\_ **Date** \_\_\_\_\_