

Custodial Account Ownership Agreement Account# [REDACTED]

SS# _____

Name of Minor _____ Birth Date _____

Name of Custodian _____ Ph# _____

Address of Custodian _____

I hereby transfer \$ _____ to the _____ Credit union for deposit into the above designated account in the name of _____ under the Wisconsin Uniform Transfer to Minors Act. This gift or transfer includes all earnings paid to the account and any future additions and is made in accordance with and is subject to all the provisions of the Wisconsin Uniform Transfer to Minors Act as it is now or hereafter may be amended. This account is not transferable to third parties.

Dated _____ Signature of Transferor X _____

The undersigned Custodian agrees to be bound by the agreements and terms of this agreement and those terms contained in the following documents and acknowledges receiving one copy of the following documents as checked.

Account Agreement Truth-in-Savings Disclosures Funds Availability Policy

Electronic Funds Transfer Policy _____

Dated _____ Signature of Custodian X _____

X _____

Designation of Successor Custodian

The undersigned custodian designates (full legal name) _____ successor custodian of this account to take effect when and in the event of my resignation, death or becoming legally incapacitated and when the Credit Union receives actual or written notice of such event. (Only an adult other than a transferor under Wis. Stat. § 880.625 or a trust company is eligible to become a successor custodian.)

Dated _____ Signature of Custodian X _____

Witness to signature of Custodian X _____

Taxpayer Identification Number and Backup Withholding Certification

Under penalty of perjury and on behalf of the Minor named on this account, the undersigned Custodian certifies that (1) the number on this card is the Minor's correct taxpayer identification number; and (2) the Minor is not subject to backup withholding because: (a) the Minor is exempt from backup withholding, or (b) the Minor has not been notified by the Internal Revenue Service (IRS) that the Minor is subject to backup withholding as a result of a failure to report all interest or dividends or (c) the IRS has notified the Minor that the Minor is no longer subject to backup withholding. (Cross out item (2) if the Minor has been notified by the IRS that the Minor is currently subject to backup withholding.)

Dated _____ Signature of Custodian X _____

Date of Approval _____ Membership Officer _____