



## Business & Nonprofit Organization Credit Union Membership & Deposit Account Application

People's Federal Credit Union, a division of Self-Help Federal Credit Union ("Credit Union")

ACCOUNT # \_\_\_\_\_

### MEMBERSHIP IDENTIFICATION REQUIREMENTS

The following documentation and information is required of any person listed on this business application or the corporate resolution as an account holder and/or account signatory.

- Name
- Date of birth
- Evidence of physical address
- Copy of a valid driver license, passport, or government-issued ID card acceptable to the Credit Union

Also, business applicants must provide the tax identification number and documentation of the business, specific to the type business, as follows:

**Corporation:** 1.) Employer Identification Number; and 2.) Articles of Incorporation

**Partnerships:** 1.) Employer Identification Number

**LLC and PLLC:** 1.) Employer Identification Number; and 2.) Articles of Organization

**Sole Proprietorship:** 1.) Social Security Number if there are no employees, or Employer Identification Number (EIN) if there are employees; and 2.) Assumed Name or similar certificate showing business name is authorized under applicable law and that it has been approved by the appropriate governmental authority

Additionally, any business applicant must complete and submit the Credit Union's **Corporate Resolution & Signature Authority** form.

### MEMBERSHIP ELIGIBILITY & MEMBERSHIP FEE

Membership in People's Federal Credit Union is open to anyone who lives, works, worships, or attends school in the Oakland Flatlands geographic region of the California bay area, and their immediate family members regardless of where the family members live. Membership is also open to businesses in the abovementioned People's Federal Credit Union geographic service area, or to any person (or institution) who (which) is, or becomes, a member of the Center for Community Self-Help.

#### Check Mark the Appropriate Membership Eligibility Status

**Oakland, CA Flatlands geographic area** (Live, work, worship in Oakland, CA Flatlands-- \$25 membership deposit)

**Center for Community Self-Help membership** (New members pay a \$25 membership fee applied as a non-refundable \$20 tax-deductible membership contribution to the Center for Community Self-Help and a \$5 membership share in People's FCU. Existing members of CCSH (or Self-Help Credit Union) need only pay a \$5 membership share to join People's FCU.)

### MEMBERSHIP INFORMATION

Account Holder \_\_\_\_\_ (Print)

Use the business/organization name as the Account Holder.

Sole Proprietorships: Also enter the business owner's full name on the Account Holder line. Full name must match TIN below.

Ownership Type \_\_\_\_\_

(Corporation, Partnership, LLC, PLLC, or Sole Proprietorship)

Taxpayer ID Number (TIN) \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Business Phone \_\_\_\_\_ Fax \_\_\_\_\_

Email Address \_\_\_\_\_

Mailing Address \_\_\_\_\_

(If not the same as street address)

City

State

Zip Code





**AUTHORIZED SIGNER (PRIMARY CONTACT PERSON)**

Authorized Signer \_\_\_\_\_ (Print)  
First Middle Last

Phone (home) \_\_\_\_\_ (work) \_\_\_\_\_

**TOTAL AMOUNT OF DEPOSIT** \$ \_\_\_\_\_

Include the membership deposit along with your account deposit or the Credit Union will deduct the amount from your account deposit.

**ACCOUNT SELECTION**

**SAVINGS**

No minimum balance to earn dividends with these accounts

**Regular Savings Account** Amount \$ \_\_\_\_\_

**CHECKING**

You must maintain a minimum balance of \$100 or more to earn a dividend on this account

**Checkless Checking** Amount \$ \_\_\_\_\_

An ATM Access Account Card is automatically issued with this account

( ) Check here to request additional ATM Access card for joint account holder(s) **(optional)** Quantity \_\_\_\_\_

**TERM CERTIFICATE ACCOUNT**

\$500 minimum deposit to open each certificate

Term choice options (in months): 3 – 6 – 12 – 24 – 36 – 48 – 60

**Term Certificate** Amount \$ \_\_\_\_\_ Term \_\_\_\_\_

**Term Certificate** Amount \$ \_\_\_\_\_ Term \_\_\_\_\_

( ) Check here if you are opening an **Economic Development Deposit** term certificate. The dividend rate of the EDD term certificate will be set at or below the savings account rate.

**OPTIONAL:** Instead of remaining with the balance, indicate whether you prefer your certificate earnings (dividend) paid by check or deposited into your designated Credit Union savings account. Please indicate whether you want the dividend check or dividend deposit issued on a monthly or quarterly basis. To open more than two term certificates at this time, please include an additional page.

( ) Issue Check ( ) Monthly ( ) Quarterly  
( ) Deposit certificate dividends into the following People's FCU savings account \_\_\_\_\_ ( ) Monthly ( ) Quarterly

Browse the People's Federal Credit Union website to view membership and account disclosures

Member deposit accounts are federally insured up to \$250,000 by the National Credit Union Administration







