

## Authorization to Link Accounts

| <b>Account#</b>       | <b>Account Owner</b> |
|-----------------------|----------------------|
| Primary Account _____ | _____                |
| Linked Account _____  | _____                |

This form is for spouses or life partners residing at the same address to request the linking of their accounts in order to establish a combined Qualified Balance for My CU Club. Qualifying balances associated with the linked account will be added to the qualifying balances of the primary account to determine the My CU Club category. Linking accounts result in a joint Qualified Balance but Qualifying Services remain separate and cannot be added together. Note that this will not affect the privacy of your accounts or the accessibility of your account information, balances, or funds.

By signing this document, we acknowledge and affirm that we are the owners of the accounts listed and that we are spouses or life-partners who reside at the same residential address.

**Please link the above accounts.**

**Please unlink the above accounts.**

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

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

### **For Internal Use Only:**

**Linking Accounts.**

- Use the MECH command to bring up the member's information.
- Locate and fill-in the field labeled *Household* with the account number for the account designated *Primary Account* on this form.
- Leave the field for *Household Code* blank.
- Fill-in *Head of Household* with *Y* on the account designated *Primary Account* and with *N* on the account designated *Linked Account* on this form.

**Unlinking Accounts.**

- Use the MECH command to bring up the member's information.
- Locate the field labeled *Household*, delete the account number in the field, and replace it with a zero (0).
- Leave the field for *Household Code* blank.
- Delete the Y or N in the Head of Household field.

Staff Member Taking Request: \_\_\_\_\_ Date \_\_\_\_\_

Staff Member Keying Request \_\_\_\_\_ Date \_\_\_\_\_

**File in each member's *FastDocs* folder under:  
Service Support → Authorizations → Other Requests**