



NEW UPDATE Adding Service(s) DATE: MEMBER NO:

Membership Eligibility Required: You are eligible if you are an employee, retiree or contractor of Dominion Energy, or a household or immediate family member of a current Dominion Energy Credit Union member. See website for details.

IMPORTANT INFORMATION ABOUT PROCEDURES FOR OPENING A NEW ACCOUNT: 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 when opening a new 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. We may also ask to see your driver's license or other identifying documents.

MEMBER/OWNER INFORMATION Update

Member/Owner Name (First, MI, Last): SSN/TIN: Mailing Address: ID Type: City/State/Zip: ID Number: Physical Address: ID Issuing State: ID Issuing Date: City/State/Zip: ID Exp. Date: Date of Birth: Email: Home Phone: Mobile Phone: Work Phone: Work Location/Interoffice Address: Verbal Password:

Eligibility: (check one) Dominion Energy: Employee Retiree Contractor Eligible Employee Group Immediate family member or household member of eligible member (member name) The IRS-required certifications set forth in the "TIN CERTIFICATION AND BACKUP WITHHOLDING INFORMATION" section apply to the member/owner listed above.

ACCOUNT OWNERSHIP

Designate the ownership of the accounts and responsibility for the services requested.

Individual Joint Account with Rights of Survivorship Joint Account without Rights of Survivorship On the death of an owner of the account, the deceased owner's interest in the account passes to the surviving owner(s) of the account. On the death of an owner of the account, the deceased owner's interest in the account passes as a part of the owner's estate by will, trust or intestacy.

X Signature Member/Owner

X Signature Joint Owner

JOINT OWNER/AUTHORIZED SIGNER INFORMATION Add Update Remove

Joint Owner UTMA Custodian Agent Other Authorized Signer (Describe): See Account Authorization Card

Name #1: SSN/TIN: Mailing Address: ID Type: City/State/Zip: ID Number: Physical Address: ID Issuing State: ID Issuing Date: City/State/Zip: ID Exp. Date: Date of Birth: Email: Home Phone: Mobile Phone: Work Phone:

ACCOUNT DESIGNATIONS

Payable on Death (POD)/Trust Account All Accounts Designate Specific Accounts: Add Update Remove

Beneficiary/POD Payee: Street: City/State/Zip: SSN: Beneficiary/POD Payee: Street: City/State/Zip: SSN:

Agency All Accounts Designate Specific Accounts: Name of Agent:

X Signature Date

UTMA CUSTODIAL DESIGNATION AND INFORMATION

The account(s) listed in the "ACCOUNT TYPE" section is/are held by:

Custodian 1: Name: Physical Address: Phone: Date of Birth: SSN/TIN: Custodian 2: Name: Physical Address: Phone: Date of Birth: SSN/TIN:

as custodian(s) for under the Virginia Uniform Transfers to Minors Act.

UTMA DESIGNATION OF SUCCESSOR CUSTODIAN

Pursuant to the Virginia Uniform Transfers to Minors Act, I hereby designate: _____ successor custodian(s) for all accounts listed in the "ACCOUNT TYPE" section. This designation shall take effect only upon my death, resignation, incapacity or removal.

X

Signature of Custodian _____ Date _____

X

Witness _____ Date _____

SERVICES YOU ARE REQUESTING

Basic Accounts

- Savings (required to join) ATM Card
No deposit required to join if doing payroll deduction
- FREE checking with eStatements and Visa® Debit Card
Includes a free set of checks and overdraft protection

Automatic Deposits

- Payroll deduction*
(deposits from paycheck - Dominion Energy employees only)
- Paid: Monthly Bi-Weekly
- Amt. \$ _____ per paycheck to _____
- Amt. \$ _____ per paycheck to _____

Direct Deposit - Dominion Energy employees use My SAP Workspace. Otherwise, contact your employer.

Join first and then apply for additional services anytime!

Holiday Club and High-Yield Savings

- Holiday Club / Amt. \$ _____ per paycheck*
 - Wealth Maximizer Money Mkt. Savings (\$50k Avg. Daily Bal.)
 - Wealth Builder Money Mkt. Savings (\$25k Avg. Daily Bal.)
 - Savings Certificate 6 mo. 1 yr. 2 yrs. 3 yrs. 5 yrs.
- Other: _____

24-Hour Account Access

- FREE Private Teller Automated Telephone Service
- Sign up online for Online Banking, FREE Bill Payer** and eStatements. ***

Please Note: \$5.00 minimum deposit to savings required to join if you are not signing up for payroll deduction. \$1,000.00 minimum savings certificate deposit.

* For Dominion Energy employees only.
 **Bill Payer payments in excess of 50 per month will incur a \$0.50 per transaction fee.
 ***Paper statement mailing fee may be imposed if certain criteria are not met.

TIN CERTIFICATION AND BACKUP WITHHOLDING INFORMATION

Under penalties of perjury, I certify that:

- (1) *The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued), and*
- (2) *I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and*
- (3) *I am a U.S. citizen or other U.S. person. For federal tax purposes, you are considered a U.S. person if you are: an individual who is a U.S. citizen or U.S. resident alien; a partnership, corporation, company, or association created or organized in the United States or under the laws of the United States; an estate (other than a foreign estate); or a domestic trust (as defined in Regulations Section 301.7701-7).*
- (4) *The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.*

Certification Instructions. Check the box for item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. By checking this box, this serves to strike out the language related to underreporting. Complete a W-8 BEN if you are not a U.S. person. If a W-8 BEN is completed, your signature does not serve to certify this section.

Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____

AUTHORIZATION

Credit Union Name: _____

By signing or otherwise authenticating, I/we agree to the terms and conditions of the Membership and Account Agreement, Truth-in-Savings Disclosure, Privacy Disclosure, Funds Availability Policy Disclosure, if applicable, and to any amendment the Credit Union makes from time to time which are incorporated herein. I/We acknowledge receipt of the agreements and disclosures applicable to the accounts and services requested herein. If an access card or EFT service is requested and provided, I/we agree to the terms of and acknowledge receipt of the Electronic Fund Transfers Agreement and Disclosure. All of the terms, conditions, form of account ownership, account selection and other information indicated on this document applies to all of the accounts listed unless the credit union is notified in writing of a change. I/We agree that any updates identified herein amend the previously signed Member Services Request(s), and are subject to the terms and conditions of the applicable disclosures noted above.

The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

X

Member/Owner _____ Date _____

X

Joint Owner/Authorized Signer _____ Date _____

CHECK ORDER FORM -A FREE SET OF CHECKS WITH NEW CHECKING ACCOUNT

Name(s) _____	Account Number _____
Street _____	Check Style – Dominion Energy Custom Check
City/State/Zip _____	Starting Check Number _____
Other Information _____	Please allow at least 10-14 business days of delivery

FOR CREDIT UNION USE ONLY <input type="checkbox"/> Check Verify _____	Checks Ordered - by _____
Date of Membership _____	Opened/App'd by _____
Private Teller Audio Response _____	Online Banking _____
ATM/Debit Card _____	Email Services: <input type="checkbox"/> Set up by _____
<input type="checkbox"/> CP for Debit Confirm. Sent. _____	