



Trust Membership Agreement
Return this document along with a Certificate of Trust

Membership Number(s): _____

Legal Name of Trust: _____

Date of Trust Agreement: _____

Trust Tax Id Number: _____

Mailing Address: _____

This Trust Is: **Revocable** **Irrevocable**

City State Zip Code

Trustee: _____

Trustee: _____

Address: _____

Address: _____

SSN: _____ Birth date: _____

SSN: _____ Birth date: _____

Trustee: _____

Trustee: _____

Address: _____

Address: _____

SSN: _____ Birth date: _____

SSN: _____ Birth date: _____

Successor Trustee: _____

Successor Trustee: _____

Address: _____

Address: _____

SSN: _____ Birth date: _____

SSN: _____ Birth date: _____

- 1) The Parties agree that they and all such accounts shall be subject to all fees and charges that may be assessed from time to time for use of such accounts. The terms of this Agreement shall supplement the terms of any other agreements ("Account Agreements) necessary to open such accounts or transact any type of business with the Credit Union as are requested by the Parties. The Credit Union reserves the right to require the Parties to execute additional or supplemental account agreement cards or other agreements, as necessary.
- 2) The Credit Union will discharge its obligation as depository by treating a Trustee as the account owner. If more than one Trustee is named in this Agreement, the Parties agree that each Trustee may act alone in transacting any business with the Credit Union and the Credit Union is authorized to release funds in any of the accounts upon the signature of any one of the Trustees signing this Agreement.
- 3) The Parties agree that all statements, notices, or other correspondences will be sent to the address of the first Trustee designated in this Agreement, unless the Credit Union receives and agrees to written notice contrary to this provision.
- 4) In the event the Credit Union is notified of the death, incompetence, resignation, or removal of Trustee, the Credit Union may rely upon any substantiating documentation of any such condition given by any Trustee. The Credit Union, in its sole discretion, may require the Successor Trustee to provide a Certificate of Trust. Upon notice of the death, incompetence, or resignation of all Trustees named in this Agreement, the Credit Union shall treat the first Successor Trustee in the same manner as the Trustee. At this time, all other successor trustees, if any, will then move up one successor position.
- 5) The Credit Union may require that all disbursements shall be made payable to any Trustee, all Trustees, to the Legal Name of the Trust or any combination of these parties.
- 6) Each of the Parties agrees to defend as well as to indemnify and hold the Credit Union harmless from any claims, suits, actions, damages, judgments, costs, charges and expenses, including court costs and attorney's fees, against any liability, loss and damage that the Credit Union shall or may sustain. Each of the Parties agrees to pay any necessary expenses, attorney's fees or costs incurred in the enforcement of this indemnification and hold harmless agreement. All Parties agree that the Credit Union may interplead or otherwise request a court to determine ownership of any funds held by it if the Credit Union believes there is a dispute or otherwise believes a court should determine to whom it should deliver the funds. If the Credit Union does interplead or otherwise requests a court to determine ownership of the funds, the Parties agree that any costs shall be paid from the funds in the accounts and may be withdrawn by the Credit Union and applied to reimburse the Credit Union for such costs or to pay such costs. Furthermore, the Credit Union may require the fulfillment of Wis. Stats. §701.1001-701.1012, as it may be revised, for determining disputes involving the accounts.

- 7) The Trustee(s) warrant that the terms of the Trust do not in any way conflict with this Agreement. The Parties hereby warrant that each account established and maintained in the Credit Union by the Trustee is established and maintained in a manner that is wholly consistent with the governing Trust and all federal and state law.

Certification of Taxpayer Identification Number (TIN) and Backup Withholding

Under penalties of perjury, I certify that: (1) The number shown on this form is my correct TIN (or I am waiting for a number to be issued to me) 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. person (including a U.S. resident alien).

Certification instructions: You must cross out 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.

The undersigned hereby acknowledge receipt of a copy of this Agreement and their consent and agreement to the above stated terms of this Agreement for themselves individually and as fiduciaries, if applicable, and for all Beneficiaries of Trust whether current, contingent or future and all of the heirs and assigns of these persons.

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

Trustee Signature _____ Date _____ Trustee Signature _____ Date _____

Trustee Signature _____ Date _____ Trustee Signature _____ Date _____

Reserved for Credit Union Use

The Credit Union hereby agrees and accepts the terms of this agreement.

Signature: _____

Title: _____

Date: _____