

Account Maintenance Request Forms

1

Visit

americanheritagecu.org/accountrequestforms

and click the link for the appropriate change request

Account Maintenance Request Forms

Account Requests

Address Change

- [Address Change on an Individual Account](#)
- [Address Change for both signers on a Joint Account](#)
- [Address Change for a Primary Member on a Joint Account](#)

Name Change

- [Name Change on an Individual Account](#)
- [Name Change on a Joint Account](#)

Add Joint a Member

- [Add a Joint Member on a Individual Account](#)
- [Add a Joint Member on a Joint Account](#)

Verification of Deposits

- [Authorization to Provide Verification of Deposit](#)

Loan Payoff

- [Authorization to Provide Loan Payoff on an Individual Account](#)
- [Authorization to Provide Loan Payoff on a Joint Account](#)

Money Orders

- [Stop Payment on a Money Order](#)

Contact Information Update

- [Contact Information Update on an Individual Account](#)
- [Contact Information Update on a Joint Account](#)

Add a Beneficiary to your Account

- [Add a Beneficiary to an Individual Account](#)
- [Add a Beneficiary to a Joint Account](#)

Beneficiary Change/Update

- [Change/Update Beneficiary on an Individual Account](#)
- [Change/Update Beneficiary on a Joint Account](#)

Beneficiary Removal

- [Beneficiary Removal on an Individual Account](#)
- [Beneficiary Removal on a Joint Account](#)

Joint Owner Removal

- [Voluntary Removal of Joint Owner](#)

Close an Account

- [Close an Individual Account](#)
- [Close a Joint Account](#)

Individual Retirement Account (IRA) Account Forms

If you require assistance in completing these IRA forms, please contact our Account Services team at 215.969.0777 ext. 7000.

IRA Applications

- [Traditional IRA Application](#)
- [Roth IRA Application](#)
- [ESA Application](#)

Distribution Forms

- [Traditional IRA Distribution](#)
- [Traditional IRA Beneficiary Distribution before 2020](#)
- [Traditional IRA Beneficiary Distribution after 2019](#)
- [Roth IRA Distribution](#)
- [Roth IRA Beneficiary Distribution after 2019](#)
- [ESA Distribution](#)

IRA Conversion

- [Traditional IRA to Roth Conversion](#)

Rollover Forms

- [Traditional IRA Direct Rollover](#)
- [Traditional IRA Rollover](#)
- [Roth IRA Rollover](#)

IRA Change of Beneficiary

- [IRA Change of Beneficiary Form](#)

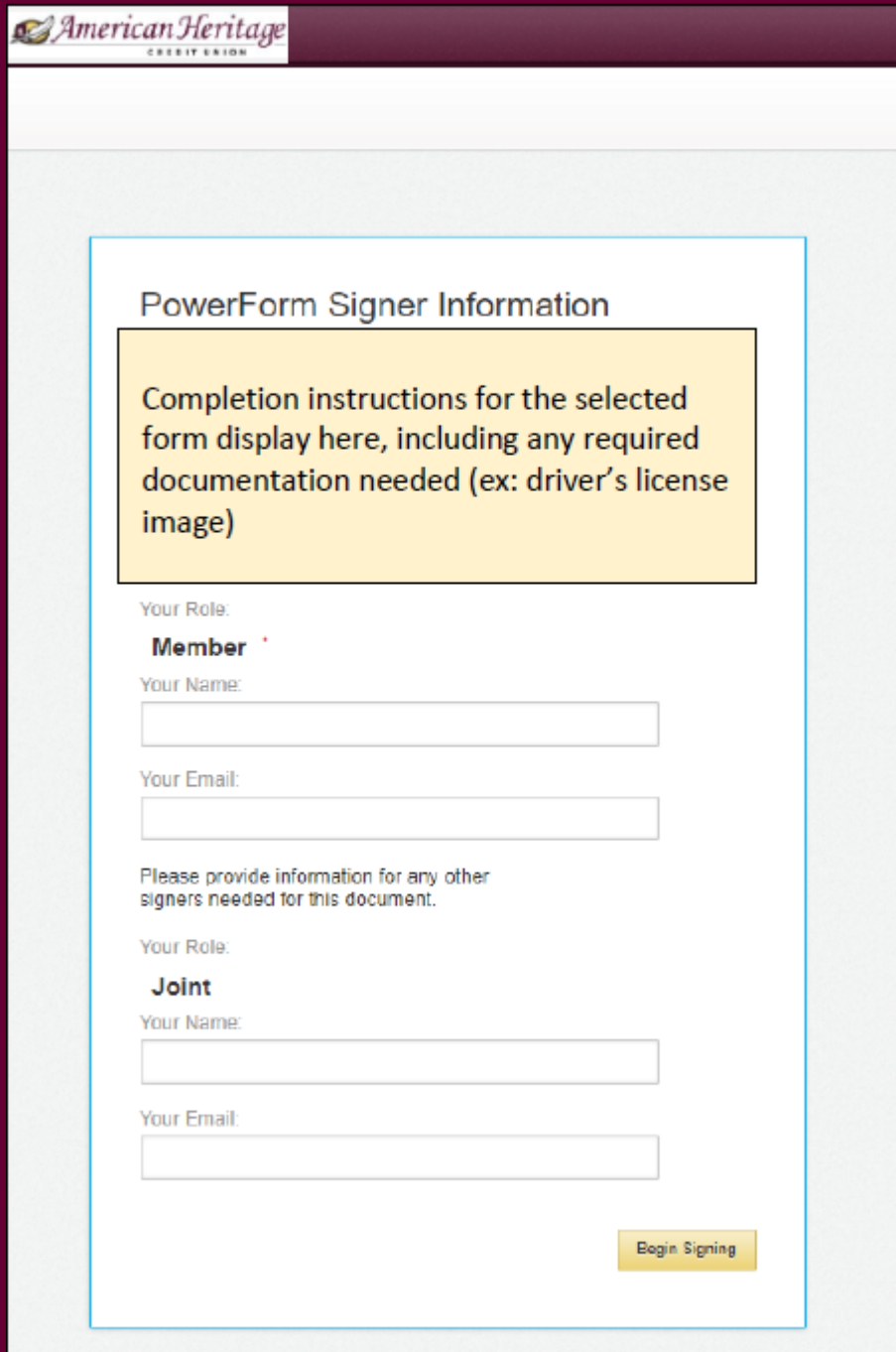
Required Minimum Distribution

- [2020 Required Minimum Distribution Waiver](#)

2

Set Roles

Provide the names and e-mail addresses of all parties involved in this transaction



The screenshot shows a web form titled "PowerForm Signer Information" from American Heritage Credit Union. It contains two sections for entering signer information. The first section is for a "Member" and the second is for a "Joint" signer. Each section includes fields for "Your Name" and "Your Email". A yellow box at the top of the form area contains completion instructions. A "Begin Signing" button is located at the bottom right of the form area.

American Heritage
CREDIT UNION

PowerForm Signer Information

Completion instructions for the selected form display here, including any required documentation needed (ex: driver's license image)

Your Role:
Member

Your Name:

Your Email:

Please provide information for any other signers needed for this document.

Your Role:
Joint

Your Name:

Your Email:

[Begin Signing](#)

3

Authenticate

Supply your personal information so we can retrieve ID verification questions for you, then answer the six corresponding questions

AHCU Membership
American Heritage Credit Union

ID Check - Personal Information

Enter your home address. This information, along with your name will be used to generate a list of questions to verify your identity.

Required Information (Home Address)

Name: Test Member

Street 1:

Street 2:

City:

State:

Zip: -

Optional Information

Last 4 digits of SSN:

Date of Birth: / /
mm / dd / yyyy

You must enter required and valid information before you can continue.

4

Form Completion

Complete only the fields required of you, which will be outlined in red (any additional signers will complete their fields when it's their turn).

IRA: Traditional SEP **TO PARTICIPATE**

IRA Holder Information Check if Amendment

Full Name

Address

City/State/Zip

Primary Phone Number **Secondary Phone Number**

E-mail Address

Deposit Information

Type of Deposit: Regular or Spousal, for tax year _____ Rollover Transfer from another IRA

Recharacterization SEP, for tax year _____ Other _____

Amount of Deposit: \$

Beneficiary Information

Primary Beneficiary **Contingent Beneficiary**

| | |
|---|---|
| Primary Beneficiary | Contingent Beneficiary |
| Name <input type="text"/> | Name <input type="text"/> |
| Relationship <input type="text"/> | Relationship <input type="text"/> |
| Social Security Number/Tax I.D. Number <input type="text"/> | Social Security Number/Tax I.D. Number <input type="text"/> |
| Date of Birth <input type="text"/> | Date of Birth <input type="text"/> |
| Address <input type="text"/> | Address <input type="text"/> |
| City/State/Zip <input type="text"/> | City/State/Zip <input type="text"/> |

Primary Beneficiary **Contingent Beneficiary**

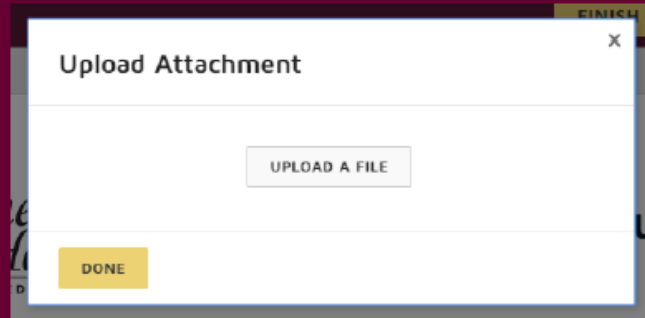
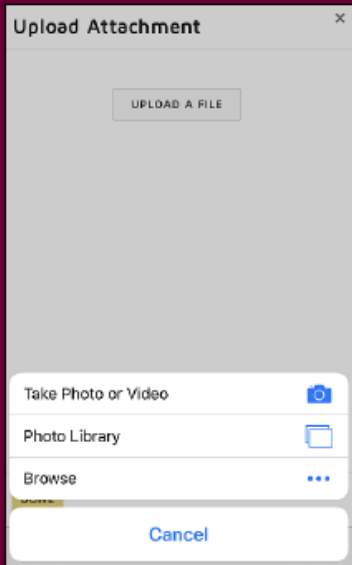
| | |
|-----------------------------------|-----------------------------------|
| Primary Beneficiary | Contingent Beneficiary |
| Name <input type="text"/> | Name <input type="text"/> |
| Relationship <input type="text"/> | Relationship <input type="text"/> |

5

Attachment

Supply required attachment

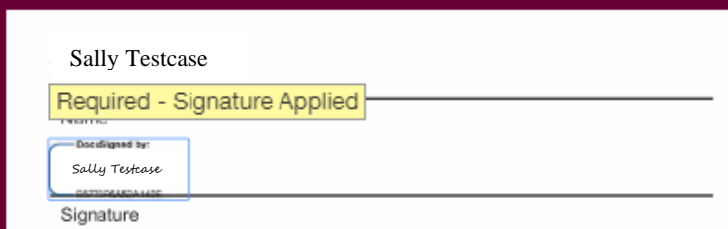
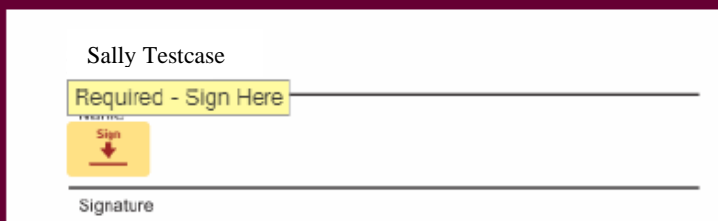
- From a mobile device, the camera is leveraged
- From a PC, Windows Explorer loads



6

Sign the Document


Click Sign and then Finish to send your envelope off to the next step.




7

Completion Notification

Once all signatures are collected, a completion e-mail is sent to all parties with a link to view the documents



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CREDIT UNION



Your document has been completed.

[VIEW COMPLETED DOCUMENT](#)

All signers completed Please DocuSign: Account Update

Powered by **DocuSign**