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 an 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
- SEP 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
- SEP 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
- 2029 Required Minimum Distribution Waiver
Set Roles

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

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

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: 
Street 1: 
Street 2: 
City: 
State: 
City:
Zip: 

Optional Information

Last 4 digits of SSN: ____________________________
Date of Birth: __________ / __________ / __________

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

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).
Attachment

Supply required attachment
• From a mobile device, the camera is leveraged
• From a PC, Windows Explorer loads

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

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