



# Account Access Agreement

**Main Account #:** \_\_\_\_\_ **Primary Member's Name:** \_\_\_\_\_

**Linked Account #:** \_\_\_\_\_ **Primary Member's Name:** \_\_\_\_\_

This agreement documents the account access between the main account and linked account for both Access 24 Phone Banking and Online Banking. This feature is not available for IRA Savings Accounts. Please Note: If you are not on the linked account, we cannot provide the linked account number to you.

<b>Option #1:</b>	<b>Inquiry Access</b>	<b>Online Banking</b>	<b>Add or Delete (circle one)</b>
-------------------	-----------------------	-----------------------	-----------------------------------

**Description:** View all balances, transactions and e-statements on linked account. Applies to current and future shares and loans.

**Authorization:** One member/owner on main account and all member/owners on linked account must sign

<b>Option #2:</b>	<b>Financial Access A</b>	<b>Online Banking and/or Access 24 (Circle One or Both)</b>	<b>Add or Delete (circle one)</b>
-------------------	---------------------------	---	-----------------------------------

**Description:** Transfer money from main account to linked account  
Trust/Custodial or Holiday Savings can only transfer to  
Health Savings Account can only transfer from

**Authorization:** One member/owner on main account must sign

<b>Option #3:</b>	<b>Financial Access B</b>	<b>Online Banking</b>	<b>Add or Delete (circle one)</b>
-------------------	---------------------------	-----------------------	-----------------------------------

**Description:** Transfer money from linked account to main account  
Trust/Custodial or Holiday Savings can only transfer to  
Health Savings Account can only transfer from

**Requirement:** All member/owners on main acct must be on linked acct

**Authorization:** One member/owner on main account must sign

<b>Option #4:</b>	<b>External Movement</b>	<b>Online Banking</b>	<b>Add or Delete (circle one)</b>
-------------------	--------------------------	-----------------------	-----------------------------------

**Description:** Use account for Bill Pay (and any other external payment services)  
Only applies to checking accounts  
Complete form to add 2<sup>nd</sup> checking account (from main account or linked account)

**Requirement:** All member/owners on main acct must be on linked acct

**Authorization:** One member/owner on main account must sign

**Applies To:** (Mark Choice) Main Account \_\_\_\_\_ AND/OR Linked Account \_\_\_\_\_

**Applies To:** (Fill in) Checking Account Number: \_\_\_\_\_



# Account Access Agreement

## Authorization

I/we request Inquiry Access, Financial Access and/or External Movement between the main and linked accounts and acknowledge that I/we understand and agree to the following terms and conditions:

- ✓ This service is protected by a PIN or password known only to the main account owners, who bear the sole responsibility to protect their password
- ✓ All account owners indemnify and hold ACMG Federal Credit Union harmless for any problems or errors arising from their request to use this service
- ✓ Any account owner can rescind this authorization at any time.
- ✓ Account owners bear the responsibility of notifying ACMG to remove linking authorizations in the case of ownership changes

\_\_\_\_\_ Date                      \_\_\_\_\_ Date  
Main Acct Signature #1                      Linked Acct Signature #1

\_\_\_\_\_ Date                      \_\_\_\_\_ Date  
Linked Acct Signature #2                      Linked Acct Signature #3

## Credit Union Use Only

\_\_\_\_\_ Date                      \_\_\_\_\_ Date  
Received by                      Processed by

\_\_\_\_\_ Date  
Audited by

Rev Date 7/22/19

**Processor Checklist**

	Option #1	Option #2	Option #3	Option #4
Access 24 (Portico)	N/A	Update Audio	N/A	N/A
Online Banking (Portico)	Update OLB E-mail Market'g to link e-statements	Update OLB	Update OLB	Update OLB
Bill Pay (Partnercare)	N/A	N/A	N/A	Add/delete funding acct for 2 <sup>nd</sup> checking acct on main or linked
All	___ E-mail mbr	___ E-mail mbr	___ E-mail mbr	___ E-mail mbr