

# Business Service Agreement

Part 1



PO Box 771069  
Wichita, KS 67277-1069  
Toll-Free 833-759-1941  
Fax 316-779-8966  
www.skywardcu.com

## BUSINESS OR ORGANIZATION INFORMATION

1

Name of Business or Organization Phone 1 Phone 2 NAICS Code #0

Address City State ZIP Taxpayer ID Number E-mail

Mailing Address (if different from Address) City State ZIP Type of Business/Org. Registration/ License No. Company Password

ACCOUNT(S)  Savings  Checking  Christmas Club  Vacation Club  2

SERVICE(S)  Debit Card  ATM Card  Online Access 3

REPRESENTATIVE(S) INFORMATION (A representative may start, conduct transactions, change, add and terminate an account, product or service for the business or organization.) 4

Representative 1 Name Title Address City State ZIP C O

Home Phone Mobile Phone Social Security Number Date of Birth E-mail Address

Driver's License - State, Number & Issue and Exp. Date Employer/Retired From Work Phone Occupation/Profession

Representative 2 Name Title Address City State ZIP C O

Home Phone Mobile Phone Social Security Number Date of Birth E-mail Address

Driver's License - State, Number & Issue and Exp. Date Employer/Retired From Work Phone Occupation/Profession

Representative 3 Name Title Address City State ZIP C O

Home Phone Mobile Phone Social Security Number Date of Birth E-mail Address

Driver's License - State, Number & Issue and Exp. Date Employer/Retired From Work Phone Occupation/Profession 5

Beneficial Owner 1 Name Title Date of Birth Social Security # Address/City/State/ZIP ID C O

TAX INFORMATION CERTIFICATION: By signing below, I certify under penalties of perjury that: (i) I am a US citizen or other US person, (ii) the Social Security Number (SSN)/Employer Identification Number (EIN) shown is my/the correct identification number and (iii) I am NOT, unless designated below, subject to backup withholding because I am exempt or I have not been notified by the IRS that I am subject to backup withholding as a result of a failure to report all dividends or interest, or because the IRS has notified me that I am no longer subject to backup withholding.

I am subject to backup withholding  Exempt (Exempt Payee Code)  I am not a United States citizen or resident (complete W-8 form)

**ACKNOWLEDGMENT:** The business or organization is or applies to be a member of Skyward Credit Union ("we", "us" & "our"), and authorizes its representative(s) to take actions and conduct transactions according to our Business Service Agreement (the BSA Parts 1 & 2). The business or organization and its representative(s) ("you" & "your") request the accounts, products and services selected on this Part 1 form, and acknowledge receiving or being offered the Part 2 of the BSA, which includes the Electronic Funds Transfer, Funds Availability and Rate & Charges disclosures (and which, along with our records, comprise the terms of the BSA). Part 2 has been emailed to Representative 1's address if provided. To identify and provide you with excellent service, we may review and image your current identification, and note the beneficial owners and control person of the business or organization. We may also obtain and use credit and account reports on the business, organization or representatives to verify your eligibility for membership and accounts, products and services we may offer. To serve your currency needs, we may require additional information from you. You affirm all information you provide is accurate, and that this Part 1 has been completed according to your instructions. You understand the BSA governs membership and current and future accounts, products, services and other aspects of your relationship with us. You agree we may rely solely on the BSA and have no obligation to rely on any other documentation. We may change the BSA, and you may make changes and additions to a Part 1 form as we allow, and those changes and additions are binding on you. You may call us with questions or obtain a copy of the BSA from us during business hours and Part 2 from our website at your convenience. You may start, maintain, review, change, add or terminate an account, product, service or membership at any time according to the BSA.

**1. Authority of a Representative.** You agree that each representative named in Part 1 of the BSA is authorized to act on behalf of you for the accounts, products and services with us based on the designated authority and Certificate of Authority & Liability below and as explained in the Part 2 of the BSA. You understand a representative may conduct transactions on and take action to start, maintain, change, add or terminate accounts, products and services, on behalf of the business or organization. If you provide us with a mobile phone number, you agree we may text or call you at that number about accounts, products and services you have or that we may offer. Calls may include autodialed, prerecorded or artificial voice calls. This consent is not required for membership, accounts, products or services. You may call, email or write us to opt out of these calls. You affirm that the account(s), product(s) and service(s) with us are for the business or organization, and that the name provided is the complete and correct name of the business or organization to be used for the account(s), product(s) and service(s) with us. Each officer, director, shareholder, partner, principal, owner, member, manager, employee, board/committee person, volunteer, fiduciary and other authorized person (as applicable) warrants that the business or organization has been duly formed and currently exists.

**2. Certificate of Authority & Liability.** You understand and agree that the authority given to a representative named on Part 1 and addressed in Part 2 of the BSA will remain in full force until we receive written notice otherwise. A representative must notify us of any change to any aspect of the business (including beneficial owners or the control person) or organization that affects the BSA when the change occurs, and you agree that we are not liable for any losses due to the failure to timely notify us of such changes. You certify the business or organization does not engage in internet gambling business and agree to notify us before engaging in any such business in the future. You and each representative understand and agree to indemnify us against and hold us harmless from any claim or liability that results from the acts of any current (or former) representative upon which we rely before notice of any change to an account, product or service or the business or organization. By signing or authorizing this Part 1, by using an account, product or service, or by receipt or accessibility of a statement, you agree to the BSA. The IRS does not require your consent to any provision of the BSA other than the certification required to avoid backup withholding (in Section 7 above).

Representative 1 Signature Representative 2 Signature Representative 3 Signature I agree to be removed as a Representative

State of \_\_\_\_\_ in the county of \_\_\_\_\_, Notary \_\_\_\_\_

This Agreement was signed before me on \_\_\_\_\_ Commission Expires \_\_\_\_\_

by \_\_\_\_\_

Names of Representatives(s)

OFFICE USE ONLY CU Employee Name ID Number Field of Membership Date  Page 1 of 2 9

# Business Service Agreement

Part 1 • P2



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**REPRESENTATIVE(S) INFORMATION** (A representative may start, *conduct transactions*, change, add and terminate an account, product or service for the business or organization.) 4

<b>Representative 4 Name</b>		Title	Address		City	State	ZIP	C	O
Home Phone	Mobile Phone	Social Security Number		Date of Birth	E-mail Address				
Driver's License – State, Number & Issue and Exp. Date				Employer/Retired From	Work Phone	Occupation/Profession			

<b>Representative 5 Name</b>		Title	Address		City	State	ZIP	C	O
Home Phone	Mobile Phone	Social Security Number		Date of Birth	E-mail Address				
Driver's License – State, Number & Issue and Exp. Date				Employer/Retired From	Work Phone	Occupation/Profession			

<b>Beneficial Owner 2 Name</b>	Title	Date of Birth	Social Security #	Address/City/State/ZIP		ID	C	O
<b>Beneficial Owner 3 Name</b>	Title	Date of Birth	Social Security #	Address/City/State/ZIP		ID	C	O
<b>Beneficial Owner 4 Name</b>	Title	Date of Birth	Social Security #	Address/City/State/ZIP		ID	C	O

**TRANSACTIONOR** or  **INFORMATION USER** (A transactionor may *conduct transactions*, & an information user may access information, on behalf of the business or organization) 6

<b>Transactionor or Info User Name</b>		Title	Address		City	State	ZIP	C	O
Home Phone	Mobile Phone	Social Security Number		Date of Birth	E-mail Address				
Driver's License – State, Number & Issue and Exp. Date				Employer/Retired From	Work Phone	Occupation/Profession			

**ACKNOWLEDGMENT:** The business or organization is or applies to be a member of Skyward Credit Union ("we", "us" & "our"), and authorizes its representative(s) to *take actions* and *conduct transactions* according to our Business Service Agreement (the BSA Parts 1 & 2). The business or organization and its representative(s) ("you" & "your") request the accounts, products and services selected on this Part 1 form, and acknowledge receiving or being offered the Part 2 of the BSA, which includes the Electronic Funds Transfer, Funds Availability and Rate & Charges disclosures (and which, along with our records, comprise the *terms* of the BSA). Part 2 has been emailed to Representative 1's address if provided. To identify and provide you with excellent service, we may review and image your current identification, and note the beneficial owners and control person of the business or organization. We may also obtain and use credit and account reports on the business, organization, representatives, transactionors and information users to verify your eligibility for membership and accounts, products and services we may offer. To serve your currency needs, we may require additional information from you. You affirm all information you provide is accurate, and that this Part 1 has been completed according to your instructions. You understand the BSA governs membership and current and future accounts, products, services and other aspects of your relationship with us. You agree we may rely solely on the BSA and have no obligation to rely on any other documentation. We may change the BSA, and you may make changes and additions to a Part 1 form as we allow, and those changes and additions are binding on you. You may call us with questions or obtain a copy of the BSA from us during business hours and Part 2 from our website at your convenience. You may start, maintain, review, change, add or terminate an account, product, service or membership at any time according to the BSA. 8

**1. Authority of a Representative, Transactionor and Information User.** You agree that each representative, transactionor and information user named in Part 1 of the BSA is authorized to act on behalf of you for the accounts, products and services with us based on the designated authority and Certificate of Authority & Liability below and as explained in the Part 2 of the BSA. You understand a representative may *conduct transactions on* and *take action* to start, maintain, change, add or terminate accounts, products and services, a transactionor may *conduct transactions on* accounts, products and services, and an information user may access information about accounts, products and services, on behalf of the business or organization. If you provide us with a mobile phone number, you agree we may text or call you at that number about accounts, products and services you have or that we may offer. Calls may include autodialed, prerecorded or artificial voice calls. This consent is not required for membership, accounts, products or services. You may call, email or write us to opt out of these calls. You affirm that the account(s), product(s) and service(s) with us are for the business or organization, and that the name provided is the complete and correct name of the business or organization to be used for the account(s), product(s) and service(s) with us. Each officer, director, shareholder, partner, principal, owner, member, manager, employee, board/committee person, volunteer, fiduciary and other authorized person (as applicable) warrants that the business or organization has been duly formed and currently exists.

**2. Certificate of Authority & Liability.** You understand and agree that the authority given to a representative, transactionor and information user named on Part 1 and addressed in Part 2 of the BSA will remain in full force until we receive written notice otherwise. A representative must notify us of any change to any aspect of the business (including beneficial owners or the control person) or organization that affects the BSA when the change occurs, and you agree that we are not liable for any losses due to the failure to timely notify us of such changes. You certify the business or organization does not engage in internet gambling business and agree to notify us before engaging in any such business in the future. You and each representative, transactionor and information user understand and agree to indemnify us against and hold us harmless from any claim or liability that results from the acts of any current (or former) representative, transactionor and information user upon which we rely before notice of any change to an account, product or service or the business or organization. To assure consent to and accuracy of the BSA, we may require a Part 1 to be notarized or re-completed and re-signed. By signing or authorizing this Part 1, by using an account, product or service, or by receipt or accessibility of a statement, you agree to the BSA. *The IRS does not require your consent to any provision of the BSA other than the certification required to avoid backup withholding* (in Section 7 on page 1).

Representative 1 Signature \_\_\_\_\_ Representative 2 Signature \_\_\_\_\_ Representative 3 Signature \_\_\_\_\_ Representative 4 Signature \_\_\_\_\_

Representative 5 Signature \_\_\_\_\_ Transactionor or Info User Signature \_\_\_\_\_ I agree to be removed as a Rep, Transactionor, or Info User \_\_\_\_\_

State of \_\_\_\_\_ in the county of \_\_\_\_\_. Notary \_\_\_\_\_

This Agreement was signed before me on \_\_\_\_\_ Commission Expires \_\_\_\_\_

by \_\_\_\_\_

Names of Representatives(s), Transactionor(s), Information User(s) \_\_\_\_\_

<b>OFFICE USE ONLY</b>	This is Page 2 of the BSA part 1 <span style="float: right;">9</span>		
	CU Employee Name	ID Number	Field of Membership
	O C A I T		Date