

Account Maintenance Request Forms

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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](#)

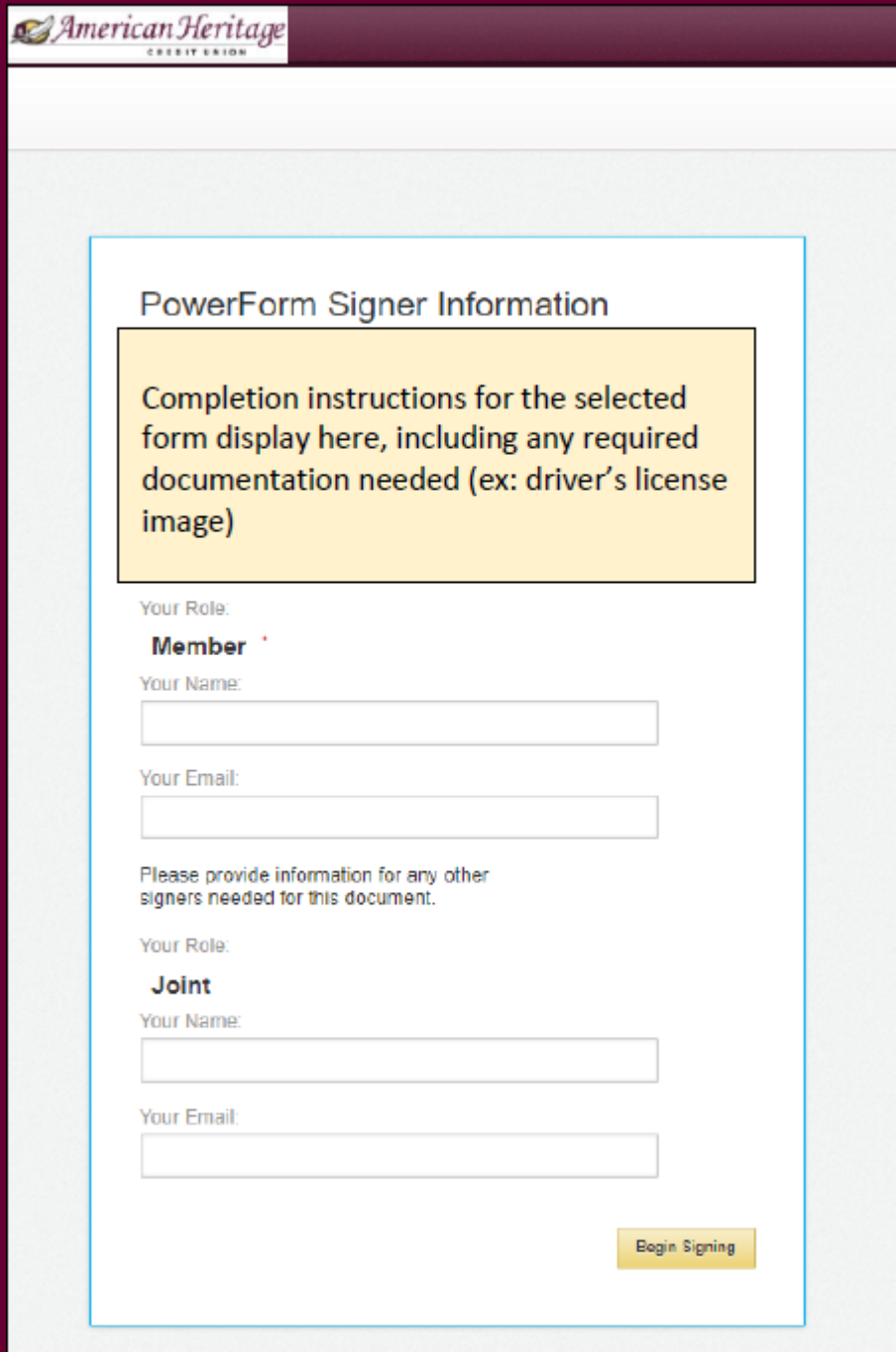
Required Minimum Distribution

- [2020 Required Minimum Distribution Waiver](#)

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Set Roles

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



The screenshot shows a web interface for American Heritage Credit Union. At the top left is the logo with the text "American Heritage CREDIT UNION". The main content area is titled "PowerForm Signer Information". Below this title is a yellow box containing the text: "Completion instructions for the selected form display here, including any required documentation needed (ex: driver's license image)".

Below the instructions, there are two sections for signer information:

Signer 1:
Your Role: **Member**
Your Name:
Your Email:

Signer 2:
Please provide information for any other signers needed for this document.
Your Role: **Joint**
Your Name:
Your Email:

At the bottom right of the form area is a yellow button labeled "Begin Signing".

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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.

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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

Name		Account Number	Social Security Number	Date of Birth
Full Name		<input type="text"/>	<input type="text"/>	<input type="text"/>
Address		Primary Phone Number	Secondary Phone Number	
<input type="text"/>		<input type="text"/>	<input type="text"/>	
City/State/Zip		E-mail Address		
<input type="text"/>		<input type="text"/>		

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

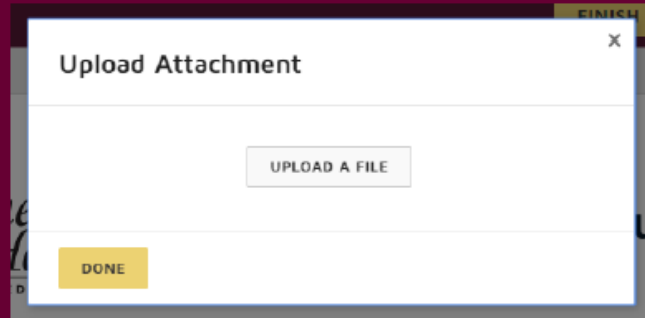
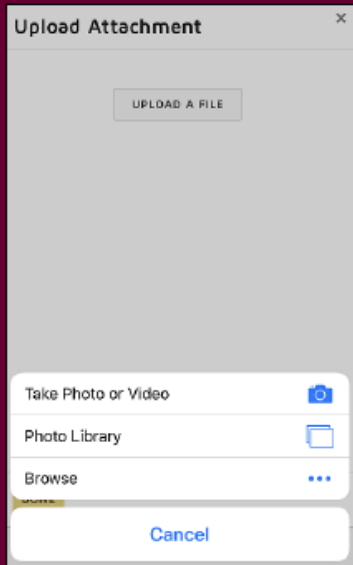
<input checked="" type="checkbox"/> Primary Beneficiary <input type="checkbox"/> Contingent Beneficiary		<input checked="" type="checkbox"/> Primary Beneficiary <input type="checkbox"/> Contingent Beneficiary	
Name	Relationship	Name	Relationship
<input type="text"/>	<input type="text"/>	<input type="text"/>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

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Attachment

Supply required attachment

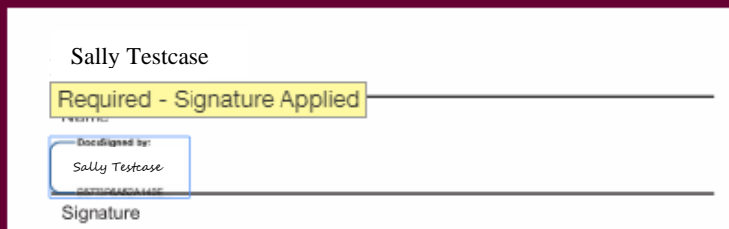
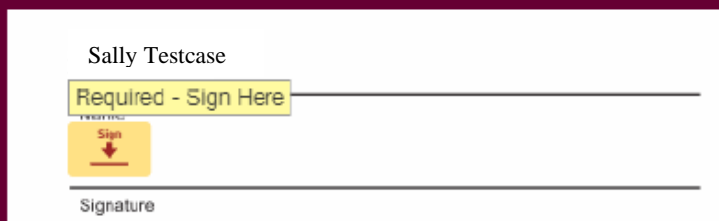
- From a mobile device, the camera is leveraged
- From a PC, Windows Explorer loads



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Sign the Document


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




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Completion Notification

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



American Heritage
CREDIT UNION



Your document has been completed.

[VIEW COMPLETED DOCUMENT](#)

All signers completed Please DocuSign: Account Update

Powered by **DocuSign**