

As we prepare for regulatory approval of the Sound Credit Union acquisition, please take a moment to review and update your account information, including any details for joint owners. Doing this now will make it easier for us to combine our accounts smoothly.

Account Information Check List

- First Name, Middle Initial, Last Name
- Email Address
- Mother's Maiden Name
- Date of Birth
- Social Security Number
- Personal Account Address(es):
 - Physical Address
 - Mailing Address
- Business Account Address(es):
 - Physical Address
 - Mailing Address
- Photo Identification:
 - Issuance Date
 - Number
 - Expiration date
- Phone Number(s):
 - Home
 - Work
 - Mobile
- Beneficiary Designation:
 - First Name, Middle Initial, Last Name
 - Date of Birth
 - Address

Good to Know!

ALL ACCOUNT HOLDERS:

New Savings Accounts: After account integration, each checking account will have a savings account assigned to it. This may increase the number of accounts you currently have.

Online Banking: Online Banking and Bill Pay records may not transfer to Sound. Make sure you have copies of these records, such as payees, payment amounts, and account numbers, to set up your account(s) at Sound.

Account Statements: Your account statements may be temporarily unavailable after integration. Save copies of all statement types before account integration for future reference.

BUSINESS ACCOUNT HOLDERS:

Documentation: Proper documents will be required depending on your account type. See Sound's Business Account Checklist at soundcu.com/files/Business-Account-Checklist.pdf

Certification of Beneficial Ownership: Documentation for "Certification of Beneficial Ownership" reports will be essential as required by U.S. Department of Treasury's FinCEN.