

CUSTODIAL ACCOUNT APPLICATION

REQUIREMENTS TO OPEN A CUSTODIAL ACCOUNT:

The Michigan Uniform Transfer to Minors Act (UTMA) account is created by a custodian who deposits funds as an irrevocable gift to a minor. A custodian is defined as an individual 18 years of age or older wishing to manage and invest funds for the minor's behalf until the minor reaches the age of majority. Minors are required to have a primary OU Credit Union account before a custodial account can be established. The minor's Taxpayer Identification Number (TIN) must be provided on the application.

ACCOUNT #

A **\$5.00 minimum deposit** into your Grizzly Saver is required to open your account.

SECTION A - ELIGIBILITY

Does the minor child have a primary OU Credit Union account? Yes (Account number _____) No

SECTION B

APPLICANT INFORMATION

Citizenship Status U.S. Citizen Resident Alien (permanent resident) Nonresident Alien (temporary resident)

Minor's Name First	Middle	Last	Physical Address – Street/Apt. <input type="checkbox"/> Own <input type="checkbox"/> Rent	City	State	ZIP Code
Mailing Address (If different than physical address) – Street/Apt. or PO Box			City	State	ZIP Code	
Mobile Phone*	Other Phone*	Email Address*		Mother's Maiden Name		
Date of Birth	Social Security No./TIN	Driver's License/Passport or Other Documentation/ID	State of Issue	Date of Expiration		

Custodian Information **Citizenship Status** U.S. Citizen Resident Alien (permanent resident) Nonresident Alien (temporary resident)

Name First	Middle	Last	Physical Address – Street/Apt. <input type="checkbox"/> Own <input type="checkbox"/> Rent	City	State	ZIP Code
Mailing Address (If different than physical address) – Street/Apt. or PO Box			City	State	ZIP Code	
Mobile Phone*	Other Phone*	Mother's Maiden Name				
Date of Birth	Social Security No.	Driver's License/Passport or Other Documentation/ID	State of Issue	Date of Expiration		
Email Address*		Employer/Previous Employer	Date Employed			
Occupation		Employment Status	Monthly Gross Income			

*You authorize us to contact you, including by electronic or automated means, such as emails, autodialed and prerecorded calls, and text messages.

SECTION C

ACCOUNT SERVICE SELECTION

By checking below, I agree to apply for/request the selected services:

Savings Options

- Insured Money Management Account (IMMA)** — Earn higher dividends on balances over \$2,000.00.
 Certificate (circle all terms that apply) — Earn fixed dividends that are higher than traditional savings accounts.

- | | |
|----------------------|----------------|
| 3 months | 2 years |
| 6 months | 3 years |
| 1 year | 4 years |
| 1-Year Add-On | 5 years |

