

# AUTHORIZATION TO ADD A NEW OWNER TO AN EXISTING ACCOUNT



## Section A: Customer Information

Current Owner Name: \_\_\_\_\_  
Account Number: \_\_\_\_\_  
New Owner Name: \_\_\_\_\_  
New Owner Address: \_\_\_\_\_  
New Owner City / State / Zip: \_\_\_\_\_  
New Owner Social Security Number: \_\_\_\_\_  
New Owner Date of Birth: \_\_\_\_\_  
New Owner Phone Number: \_\_\_\_\_  
New Owner Email Address: \_\_\_\_\_  
New Owner Occupation: \_\_\_\_\_  
New Owner Employer: \_\_\_\_\_  
New Owner Citizenship (See below): \_\_\_\_\_

1. US Citizen/Resident    2. US Citizen/Non-Resident    3. Non-US Citizen/Resident    4. Non-US Citizen/Non-Resident

## Section B: New Owner Certification & Signature

USA PATRIOT Act Notice: Federal law requires all financial institutions to obtain, verify and record information that identifies each person who opens an account including your name, address, date of birth, and other information that will allow us to verify your identity.

Under penalties of perjury, I certify that:

- 1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and**
- 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and**
- 3. I am a U.S. citizen or other U.S. person as defined by the Internal Revenue Service.**

For federal tax purposes, you are considered a U.S. person if you are: a) An individual who is a U.S. citizen or U.S. resident alien, b) A partnership, corporation, company, or association created organized in the United States or under the laws of the United States, c) An estate (other than a foreign estate), or d) A domestic trust (as defined in Regulations section 301.7701-7).

Form W-9 instructions are available upon request or on [www.irs.gov](http://www.irs.gov). Non-US persons file Form W-8.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return.

By signing this form I understand I am bound by the terms and conditions of the New Account Agreement which was sent when this account was opened, I understand the USA PATRIOT Act notice above, and certify my Taxpayer Identification Number. The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

\_\_\_\_\_  
New Owner Signature

\_\_\_\_\_  
Date

## Section C: Current Owner Acknowledgement & Signature

I understand that by adding a new owner to my Ameriprise Bank account that user may make or request transactions which can impact my account including but not limited to all the same access, ability to transact, view, and modify my account as I have. I understand and agree that as the underlying account holder under the terms of the account agreement, I am solely responsible for the result of my actions or the actions of this new owner whom I have granted access to my account and agree to hold Ameriprise Bank harmless.

\_\_\_\_\_  
Current Owner Signature

\_\_\_\_\_  
Date

**Submit request via fax or mail to the following:**

Fax: 1 (888) 871-0327

Mail: Ameriprise Bank, FSB, 834 Ameriprise Financial Center, Minneapolis, MN 55474

*Ameriprise Bank, FSB, Member FDIC, is an Equal Housing Lender.*

*Ameriprise Financial Services, Inc. and Ameriprise Bank, FSB are subsidiaries of Ameriprise Financial, Inc.*

© 2009 Ameriprise Financial, Inc. All rights reserved.

404058 D (10/09)