Clear

Navy Federal®

Change of Information *(for account holders 18 and over)*

Use this form to change personal information.

Please print and use black ink pen to fill in the blanks.

A. My Current Information

Name: First	MI	Last	Suffix	Access Number

Taxpayer Identification Number *(SSN/ITIN)*	**Citizenship / Residency Status** *(Selection Required)* *This helps us meet federal requirements for identification and tax reporting.*	☐ U.S. Citizen *(including U.S. National)*	☐ Resident Alien *(Lawful Permanent Resident / Green Card holder)*	☐ Non-Resident Alien *(Not a U.S. Citizen or Permanent Resident / Green Card holder)*

B. My New Information[1] *(Only complete information that is changing.)*

☐ Mr. ☐ Ms. ☐ Mrs. ☐ Miss ☐ Prefer not to say	Name: First	MI	Last	Suffix

Current Home Address: Street Cannot Be a Post Office Box	City	State	ZIP Code

Mailing Address: Street If Different From Above Address	City	State	ZIP Code

Date of Birth *(MM/DD/YYYY)*	Taxpayer Identification Number *(SSN/ITIN)*	Mobile Phone Number[2]	Other Contact Number

Email Address

[1]Changing your name, date of birth, and/or SSN or ITIN requires additional documentation. Please see below for acceptable documents.

[2]By providing a mobile number, you are granting Navy Federal permission to place automated, prerecorded, or artifical-voice non-marketing calls and text messages to that number. Messaging and data rates from your carrier may apply. Message frequency may vary.

C. My Employment Information

Employer's Name	Job Title/Rank

Rate	☐ DoD Military	☐ Civilian DoD Employee	☐ Non-DoD Civilian Employee	Re-enlistment/EAOS Date *(MM/DD/YYYY)* *(if applicable)*
	☐ Retired, but Employed	☐ Fully Retired	☐ Not a Wage Earner	

Acceptable Documents

Social Security Number Change
(Please provide 1.)

- Social Security Card
- Other Documentation With Full SSN From Social Security Administration

Date of Birth Change
(Please provide 1.)

- Birth Certificate
- Driver's License/Government/State-Issued Photo ID

Full Name Change[3]
(Please provide 1 from each category.)

Photo ID with new name:

- Driver's License/Government/State-Issued Photo ID

Second document with new name:

- Court Document[3]
- Social Security Card

Proof of previous name:

- Marriage License
- Divorce Decree
- Court Document[3]

Last Name Only[3]
(Please provide 1 from each category.)

Proof of previous last name:

- Marriage License
- Divorce Decree
- Court Document[3]

Proof of new last name:

- Driver's License/Government/State-Issued Photo ID

[3]An applicable Court Order may be used.

D. Disclosure Agreement and Survivorship Designation

Account Disclosures: I acknowledge that membership at Navy Federal comes with certain ongoing responsibilities. By signing this document, I acknowledge receipt of and agree to all terms and conditions in the Important Disclosure booklet and all other disclosed terms and conditions of all accounts and services that I may receive at Navy Federal. These terms and conditions will be disclosed in accordance with applicable state and federal laws. I understand that Navy Federal may restrict or suspend my access to products or services if I engage in conduct that is abusive to the credit union or its membership.

Consumer Reports: I authorize Navy Federal to obtain a consumer credit report to evaluate my creditworthiness so that I may be considered for other Navy Federal products and services. I also authorize Navy Federal to obtain consumer reports for the purposes of evaluating this membership application and reviewing any Navy Federal accounts I open. I understand these reports may be used in decisions to deny account applications, close accounts, and/or restrict accounts or services.

Escheatment: I acknowledge that my property may be transferred to the appropriate state *(i.e., "escheated")* if there has been no activity on any of my accounts within the time period specified by state law.

Identification: Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account, including joint owners and authorized signers. *What this means for you:* When you open an account, we will ask you for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents. It may be necessary for Navy Federal to restrict account access or delay the approval of loans pending further verification of your identity or documentation related to your eligibility.

© 2026 Navy Federal NFCU 97CI (10-26)

Statutory Lien: I acknowledge and pledge to Navy Federal a statutory lien in my shares and dividends on deposit in all joint and individual accounts and any monies held by Navy Federal now and in the future, to the extent of any loan made and any charges payable. The statutory lien does not apply to shares in any Individual Retirement Account.

Security Interest: I acknowledge and pledge to Navy Federal a security interest in the collateral-securing loan(s) that I have with Navy Federal now and in the future, including any type of change or increase, and any proceeds from the sale of such collateral and of insurance thereon, not to exceed the unpaid balance of the loan. This security interest in collateral-securing loans does not apply to any loan(s) on my primary residence.

Contractual Lien: I authorize Navy Federal to transfer funds from any accounts in which I have an ownership interest to correct a negative or overdrawn amount on any account on which my name appears. My authorization applies to all funds I voluntarily deposit into Navy Federal accounts, including Social Security funds, as permitted by law.

E. Required Signature and Tax Certification

By signing, I acknowledge that I have read and agree to the information/disclosures on page 1 and above.

Tax Certification *(This certification does not apply if I have checked the box below my signature.)*

Under penalty of perjury, I certify that (1) the SSN/ITIN provided is correct, (2) I am not subject to backup withholding, and (3) I am a US Citizen or US resident alien.

The FATCA code certification does not apply.

The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

Requester's Signature *(required)*	Date *(MM/DD/YYYY)*
▶	

☐ By checking this box, I certify that I am not a U.S. citizen or a green card holder and that I have completed form W-8BEN.

Submission Instructions

Fax: Fax completed form to 703-206-4600, ATTN: "Membership Administration."

Mail: Send completed form and photocopy of supporting documents to Navy Federal Credit Union, PO Box 3002, Merrifield, VA 22116-9887.

Online: Sign in to Online Banking ➤ Click on ✉ to open Message Center ➤ Click on ✎ ➤ In the drop down of "I have a question about," select "General" ➤ In the drop down for "Reason," select "Add/Remove Joint Owner" ➤ In the "Message" box, type in a message ➤ Attach completed 97CI and any supporting documents.

Branch: Go to **navyfederal.org/branches-atms.html** to find your closest branch office.

For Office Use Only		
Documents Used to Produce Name Change *(Please indicate which documents were used.)*	Specify document used as proof of maiden name *(e.g., Marriage License, Divorce Decree)*	SOB Code
Documents Accepted to Change Last Name Only *(Must have 1 form of ID that shows new name.)*	☐ Driver's License/Government/State-Issued Photo ID ☐ Passport ☐ Military ID ☐ Court Document *(specify)*: _____	Employee Number
Documents Accepted to Change Full Name *(Must have 2 forms of ID that show new name.)*	☐ Driver's License/Government/State-Issued Photo ID ☐ Passport ☐ Military ID ☐ Court Document *(specify)*: _____	Access Number

© 2026 Navy Federal NFCU 97CI (10-26)