

Appointment Document Requirements

Personal Memberships

Adult Membership:

- Two Forms of Identification
 - State/Government Issued Identification
 - Credit/Debit card, Social Security Card, Passport, etc.
- Proof of Address (if not current on State/Government ID)
 - Utility Bill, Car Registration, Insurance Card, etc.
- \$25 Deposit to Membership Savings
 - Additional \$50 deposit for a checking account*

Youth Membership:

- Minor's Social Security Card
- Parent or Legal Guardian must be present (minors 13 & under)
- Minor's able to write their own name must be present
- \$5 Deposit to Membership Savings

Trust Memberships

- All items under **Adult Membership** if not an existing member
- Name, Address, Phone #, Social Security #, Date of Birth, and ID # for all Trustors, Trustees, and Successor Trustees
- Name and Address of all beneficiaries
 - Social Security Number is optional but helpful
- Proof of TIN
 - Trustee's Social Security Number (Revocable Trusts only), SS-4, or Employer Identification Number (EIN) Confirmation from IRS Website
- \$25 Deposit to Membership Savings
 - Additional \$50 deposit for a checking account*

Business Memberships

Documentation for Business Memberships depend on the type of business being opened. Please click [here](#) for a list of required documentation by business type or call our Member Support Center at (707) 445-8801 ext. 1270 for more information

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