



P.O. Box 182084 Columbus, OH 43218
Bread Savings Customer Care: 833-755-4354
Savings.Breadfinancial.com

Bread Savings Change of Information/Add Joint Owner Form

Use this form to change personal information or to add a Joint Owner

Section A: Existing Bread Savings Account Owner Information

| | |
|-------------------------|-------------------------------|
| Name (First, MI, Last): | Social Security Number (SSN): |
|-------------------------|-------------------------------|

Section B: Change of Information (Only complete the information that is changing)

| | |
|---|-------------------------------|
| Name (First, MI, Last): | |
| Date of Birth (MM/DD/YY): | Social Security Number (SSN): |
| Current Home Address (Cannot be P.O. Box): (Include Street, City, State and Zip) | |
| Mailing Address (If different than above): (Include Street, City, State and Zip) | |
| Phone Number: | Other Contact Number: |
| Email Address: | |

Changing your name, date of birth, and/or SSN requires additional documentation.

You must also complete Section D (when noted) and Section F of this form.

Please see below for acceptable documents.

| Acceptable Documents | | |
|--|--|---|
| Social Security Number Change (Please provide one from each category.) Category 1 Proof of Social Security Number: <ul style="list-style-type: none">• Social Security Card• Other Documentation With Full SSN From Social Security Administration Category 2 Photo ID: <ul style="list-style-type: none">• State or Government-Issued Photo ID Note: Must complete Certification of Taxpayer Identification (Section D) | Full Name Change (Please provide one from each category.) Category 1 Photo ID with new name: <ul style="list-style-type: none">• State or Government-Issued Photo ID Category 2 Second document with new name: <ul style="list-style-type: none">• Court Document• Social Security Card Category 3 Proof of previous name: <ul style="list-style-type: none">• Marriage License• Divorce Decree• Court Document Note: Must complete Certification of Taxpayer Identification (Section D) | Last Name Only (Please provide one from each category.) Category 1 Proof of previous last name: <ul style="list-style-type: none">• Marriage License• Divorce Decree• Court Document Category 2 Proof of new last name: <ul style="list-style-type: none">• State or Government-Issued Photo ID Note: Must complete Certification of Taxpayer Identification (Section D) |
| Date of Birth Change (Please provide one of the following.) <ul style="list-style-type: none">• Birth Certificate• State or Government-Issued Photo ID With Date of Birth | | |



Please see next page for Joint Owner information.



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Beneficiaries cannot be named as Joint Owners on the same account

Section C: Joint Owner Information (Only complete if adding a Joint Owner). The Joint Account Owner being added must complete Section C, D and E.

To help the government fight the funding of terrorism and money laundering, federal law requires all U.S. financial institutions to obtain, verify, and record information that identifies each person who is an owner of an account. What this means for you: When you are added as an account owner, we will ask for your name, a street address, date of birth, and other information that will allow us to identify you. We may also ask to see your identifying documents.

We only open accounts for legal U.S. residents for applicants 18 or over. By signing and submitting this application, you are acknowledging that you are a U.S. citizen or resident alien of the U.S.

| | | |
|---|-------------------------------|-----------------------|
| Name (First, MI, Last): | | |
| Date of Birth (MM/DD/YY): | Social Security Number (SSN): | |
| Current Home Address (Cannot be P.O. Box): (Include Street, City, State and Zip) | | |
| Mailing Address (If different than above): (Include Street, City, State and Zip) | | |
| Occupation: | Phone Number: | Other Contact Number: |
| Email Address: | | |



Please see next page for Certification of Taxpayer Identification Number.





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Section D: Certification of Taxpayer Identification Number

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; and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.*

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. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN.

*This certification is Not Applicable.

Please refer to IRS Form W-9 instructions for additional information.

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

| | | |
|-------------------|--------------|--------------|
| Signature: | Name: | Date: |
| | | |



Please see next the page for important disclosures, required signatures, and submission instructions.





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Section E: JOINT ACCOUNT OWNER CERTIFICATION AND ACKNOWLEDGMENT

(To be completed by the new joint account owner, if applicable)

By signing below and submitting as a Joint Account Owner you are confirming that the information you have provided on this form is true and correct. You further agree to the terms of the Digital Banking Services and Deposit Account Terms and the Financial Privacy Notice, and you authorize us to verify information provided on this form in connection with the account.

| | |
|---|----------------------|
| Joint Account Owner's Signature: | Today's Date: |
|---|----------------------|

Section F: ACCOUNT OWNER CERTIFICATION AND ACKNOWLEDGMENT

(To be completed by account owner)

By signing below and submitting this form you acknowledge and authorize the Change of Information and/or to Add a Joint Owner. You are also confirming that the information you have provided on this form is true and correct and you authorize us to verify information provided on this form in connection with the account.


| | |
|---|----------------------|
| If Applicable- Add the individual identified in Section C as Joint Owner to the following accounts (The "Change of Information/Add Joint Owner Form" will need to be completed for each new owner added): | |
| Account Owner's Signature: | Today's Date: |

Return all pages (4 of 4) of the completed and signed form with any attached documents via your Secure Messages.

Request will not be considered valid unless all pages are complete and returned along with the required document(s).

You will be notified within three to five business days after we have received the completed form and all applicable documentation.

How to send these forms to us by Secure Message:

Login to your online banking and select "Messages" from your menu or Dashboard then select to "Start a Conversation" → select the  icon next to "Type your message..." → select "Files" → select the completed form → type and title your message: **Change Info/Add Joint** → select "Send"

