

Navy Federal® Business Servicing Form

- Add Owner
- Remove Owner
- Change Percentage of Ownership

(Instructions and General Information)

Note: For fastest processing, please review and follow all instructions. Complete only the section(s) applicable to the request. All owners must sign authorizing the changes.

Changes to General Information

Only changes to current information should be provided in this section. Any changes to business ownership will require submission of additional or updated documentation to Navy Federal.

Beneficial Owner Certification

To help the government fight financial crime, federal regulation requires certain financial institutions to obtain, verify, and record information about the beneficial owners of legal entity customers.

- Depending on the change in ownership, a new Certification Regarding Beneficial Owners of Legal Entity Customers (NFCU 98) form may be required.

Add/Remove Owner(s)

- When removing an owner, all owners (current and the one(s) being removed) must sign the Business Servicing Form.

Signatory Authorization and Agreements

- Signatures must be provided by all business owners and entity owner representatives.

Submission Instructions

Online: Sign in to Online Banking and use the “Send Us a Message” option. Attach the completed form and supporting documentation.

Navy Federal®
Business Servicing Form
Add/Remove Owner or Change Ownership Percentage

Business Access No.

INSTRUCTIONS: Complete only the section(s) applicable to your request. All owners must sign authorizing changes.

Current Information

Business Name:	Tax ID No. (EIN or SSN):
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To help the government fight financial crime, federal regulation requires certain financial institutions to obtain, verify, and record information about the beneficial owners of legal entity customers. This section must be completed when adding a product or adding/removing owner(s).

Beneficial Owner Certification

Select one of the following:

- N/A – Business is a sole proprietorship, unincorporated association, or otherwise not applicable.
 Certification Regarding Beneficial Owners of Legal Entity Customers (NFCU 98) form attached.

Add/Remove Owner(s)

Note: When adding/removing owner(s), also complete the Beneficial Owner Certification section of this form.

- Add Owner Remove Owner

Name: First	MI	Last	Suffix
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Issue Business Debit Card? <input type="checkbox"/> Yes <input type="checkbox"/> No	Access Number:	Percentage of Ownership: %
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Add/Remove Owner(s)

Note: When adding/removing owner(s), also complete the Beneficial Owner Certification section of this form.

- Add Owner Remove Owner

Name: First	MI	Last	Suffix
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Issue Business Debit Card? <input type="checkbox"/> Yes <input type="checkbox"/> No	Access Number:	Percentage of Ownership: %
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Change/Verify Percentage of Ownership (Changes in ownership percentages to more than or less than 25% may require a new NFCU 98.)

Name	Title	Percentage of Ownership %
Name	Title	Percentage of Ownership %
Name	Title	Percentage of Ownership %
Name	Title	Percentage of Ownership %

Signatory Authorizations and Agreements

Owner 1 Signature ►	Printed Name	Date (MM/DD/YY)
Owner 2 Signature ►	Printed Name	Date (MM/DD/YY)
Owner 3 Signature ►	Printed Name	Date (MM/DD/YY)
Owner 4 Signature ►	Printed Name	Date (MM/DD/YY)
As Representative for Entity Owner 1 Signature ►	Printed Name	Date (MM/DD/YY)
As Representative for Entity Owner 2 Signature ►	Printed Name	Date (MM/DD/YY)

