



REPRESENTATIVE PAYEE ACCOUNT CHECKLIST

Membership with the Credit Union is open to all who live, work, worship, attend school, volunteer or participate in associations headquartered on the island of Hawaii. Immediate family or household members of such persons are also eligible for membership¹.

Minimum Opening Balance: \$50.00

For accounts established for the benefit of a minor, the minimum opening balance is \$5.00, consistent with the Children's Regular Share account.

Please visit any Credit Union branch office to open the account.

Documentation Required. Please provide the original, un-expired documents as applicable:

- ☐ Federal Tax ID Number for Beneficiary and Custodian of the account
- ☐ Valid, un-expired, government-issued identification with photo for the Custodian of the account
- ☐ Copy of directive from the Social Security Administration appointing the Representative Payee
- ☐ Beneficiary must be eligible for membership with the Credit Union

¹"Immediate family member" means spouse, child, sibling, parent, grandparent, grandchild, stepparents, stepchildren, stepsiblings, and adoptive relationships.