



# Concierge Service Application

P.O. Box 6006, Bethesda, MD 20827-6006



Please print clearly

MEFCU account number \_\_\_\_\_

Name (last, first, middle initial) \_\_\_\_\_

Address \_\_\_\_\_

City, state, zip \_\_\_\_\_

Social security number \_\_\_\_\_

Date of birth \_\_\_\_\_

Home phone \_\_\_\_\_

Work phone \_\_\_\_\_

## CONCIERGE SERVICE

Concierge Silver and Gold require a savings and checking relationship. You must maintain a specific minimum combined average daily share balance. Balances in all other share accounts such as IRAs, money market accounts, and share certificates will also apply toward the Concierge Service minimum combined average daily balance requirement. In addition, loan balances (excluding credit cards and first mortgages) will count toward the Concierge Gold balance requirement.

I select:

- Concierge Silver (minimum \$5,000 combined deposit balance)
- Concierge Gold (minimum \$25,000 combined deposit balance or \$50,000 in deposits and loans other than credit cards and first mortgages)



## Marriott Employees' Federal Credit Union (MEFCU) Concierge Service Request & Agreement

By signing this application, I apply for Marriott Employees' Federal Credit Union (MEFCU) Concierge Service. I agree to abide by the terms and conditions below, and the terms and conditions applicable to each product or service which I obtain from MEFCU now or in the future.

I understand that Concierge Silver and Concierge Gold are programs that require me to maintain the following: a MEFCU savings account, a MEFCU checking account, and a combined minimum average daily balance. I understand that if my combined minimum average daily balance falls below the required amount (specifically a minimum average daily share balance of \$5,000 for Concierge Silver or a minimum average daily balance of \$25,000 in shares or \$50,000 in shares and loans, excluding first mortgages and credit cards, for Concierge Gold), I will be assessed a single monthly maintenance fee that will be deducted from my checking account. The fees are disclosed to me in the MEFCU Schedule of Account Fees.

New accounts or services that I obtain which may qualify to become part of my Concierge Service will not automatically be linked to my Concierge Service. I agree to notify MEFCU of any additional accounts or services that I may want to add to my Concierge Service, now or in the future.

I acknowledge the receipt of the MEFCU rules and regulations governing any service I have requested and to be bound by its terms as may be amended from time to time. I also agree that the use of any product constitutes acceptance and agreement to be bound by the rules and regulations governing such product or service.

x \_\_\_\_\_  
Signature of Primary Owner Date

x \_\_\_\_\_  
Signature of Joint Owner (If applicable) Date

For Credit Union use only:

Account Number \_\_\_\_\_

Date Opened \_\_\_\_\_

Operator ID \_\_\_\_\_