



COOGAN ACCOUNTS

Thank you for contacting First Entertainment Credit Union to set up a Coogan Account.

Attached you will find a Coogan Account Membership Application signature card which must be completed, signed (wet signature), and returned.

For our files, we ask that you send us the following:

1. A copy of a valid driver's license from the trustee, who is the parent or legal guardian
2. The signed and completed Membership Application
3. One document from the list below:
 - a) A certified copy of the minor's birth certificate; or
 - b) A certified copy of an Abstract of Birth for the minor; or
 - c) A photocopy of either items a) or b)
4. One item from the list below:
 - a) Proof of an audition in California; or
 - b) Copy of a page from the minor's contract with an entertainment industry company in California.; or
 - c) Copy of a paystub that shows the child is working for an entertainment industry company in California
5. A check or money order in the amount of \$55.00:
 - a) \$5.00 membership fee.
 - b) \$50.00 required minimum balance.

Please send to:

First Entertainment Credit Union
Attn: Coogan Account Specialist
PO Box 100
Hollywood, CA 90078-0100

Sincerely yours,

Coogan Account Specialist



MEMBERSHIP APPLICATION

Minor Blocked – Coogan Trust Account

PLEASE PRINT CLEARLY OR TYPE. COMPLETE ALL APPLICABLE SECTIONS AND SIGN WHERE INDICATED

ACCOUNT NAME:	ACCOUNT NUMBER:
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OWNERSHIP TYPE Coogan Trust Account Court Ordered Minor Blocked Trust Account (attach court order)

IDENTIFYING INFORMATION

To help the government fight the funding of terrorism and money laundering activities, Federal Law requires that we obtain, verify and record information that identifies each person who opens an account. What this means for you: When you open an account, we will ask for your name, address, date of birth, and other information that will allow us to identify you and the minor. We will also ask to see your driver's license or other identifying documents. **A certified copy of the minor's birth certificate is required prior to the minor withdrawing funds upon reaching majority unless a court order is provided. You may wish to include a certified copy of the birth certificate to prevent delays in the future.**

ACCOUNT TYPE(S) AND ADDITIONAL SERVICES

- First500 Savings (Required to Establish Membership)
- Money Market
- Term Savings Certificate
- Secondary Savings
- Other Savings
- Telephone Banking Online Banking

Because this is a blocked account your access to this account via our Telephone and Online Banking services is limited to inquiries only. No access devices such as ATM or Visa Debit Cards will be issued.

Minor Beneficiary

Legal Name	(Also Known As "aka")	Social Security Number	Date of Birth
Mailing Address	City	State	Zip Code
Home Phone	Mother's Maiden Name		
Residence Street Address/City/State/Zip (if different than the Mailing Address listed above or if the Mailing Address listed above is a P.O. Box)			

Trustee 1
(Parent and/or Legal Guardian)

Legal Name	Social Security Number	Date of Birth	Relationship to Minor
Home Phone	Alt. Phone	ID Type, State/Issued By, Number Expiration	Mother's Maiden Name
Residence Street Address/City/State/Zip (if different than the Mailing Address listed above or if the Mailing Address listed above is a P.O. Box)			
E-mail address	Employer	Occupation	

Trustee 2

Legal Name	Social Security Number	Date of Birth	Relationship to Minor
Home Phone	Alt. Phone	ID Type, State/Issued By, Number Expiration	Mother's Maiden Name
Residence Street Address/City/State/Zip (if different than the Mailing Address listed above or if the Mailing Address listed above is a P.O. Box)			
E-mail address	Employer	Occupation	

**MEMBERSHIP
ELIGIBILITY**

The minor is eligible for membership in First Entertainment Credit Union because:

- Family Membership:
Relationship: _____
Name of family member or domestic partner: _____
 - Employed by: _____
 - Live, work or worship in the following community: _____
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As Trustee(s) for the Minor Beneficiary named herein, I/we hereby make application for membership for the Beneficiary in First Entertainment Credit Union (the "Credit Union") and certify that the Beneficiary is within the Credit Union's field of membership.

1. By signing below, I/we agree to be bound by the Credit Union's bylaws and policies, and to the terms and conditions of this and all account agreements with the Credit Union now or in the future, including, but not limited to, the Account Agreement and Truth-in-Savings Disclosure, and the Electronic Services Disclosure and Agreement (if applicable), receipt of which is hereby acknowledged and which are incorporated into and made part of this Membership Application as though they were set forth herein.
2. I/we agree that the Credit Union may retain this Membership Application and any other information the Credit Union may receive.
3. I/we understand and agree that this Membership Application will govern only this Minor Blocked – Coogan Trust Account. If I/we wish to open additional accounts, I/we understand and agree that I/we must execute a new Membership Application.
4. I/we authorize the Credit Union to obtain my/our consumer credit report information from consumer reporting agencies for the purpose of identity verification and/or to determine my/our eligibility for other Credit Union products or services.
5. I/we agree to provide a copy of any and all orders of the court regarding this Minor Blocked – Coogan Trust Account to the Credit Union immediately. I/we agree to inform the Credit Union in writing if a change is made in any order of the court.
6. I/we agree to notify the Credit Union in writing if a change of trustee occurs.
7. I/we agree to notify the Credit Union if any beneficiary listed herein ceases to be a beneficiary or changes address. Providing such a notice of termination of beneficiary shall impose no obligation on the Credit Union for the contents of the notice.
8. The following rules shall govern disbursements of funds in this Minor Blocked – Coogan Trust Account:
 - a. No withdrawal of funds shall be made unless: (i) the Trustee seeking the disbursement of funds presents a certified copy of an order of the court; or (ii) the beneficiary seeking the disbursement of funds upon reaching the age of 18 years presents a certified copy of the beneficiary's birth certificate.
 - b. No transfers of funds shall be permitted unless: (i) the transfer is to another account at the Credit Union and the funds transferred shall continue to be held in a Coogan Trust Account; or (ii) the transfer is to another financial institution or company, the funds transferred will continue to be held in trust pursuant to California Family Code § 6750 et seq., and the Credit Union has provided written notification to the transferee financial institution or company of the application and requirements of California Family Code § 6750 et seq.
9. Any payment in accordance with Section 8 shall be valid and shall discharge the Credit Union from any liability.
10. My/our death or incompetence shall not revoke the Credit Union's authority until the Credit Union has received written notice of the fact of my/our death or adjudication of incompetence and has reasonable opportunity to act on it.
11. No transfer of voting rights or other membership privilege is permitted by virtue of a transfer of shares. Accounts are not transferable, as defined in 12 C.F.R. Part 204.
12. I/we acknowledge and agree that the Credit Union's sole obligation to me/us and the Minor Blocked – Coogan Trust Account is as a depository institution and is a debtor/creditor relationship and nothing in this Membership Application or in any trust instrument shall be construed to impose any duties or obligations whatsoever upon the Credit Union as a trustee or other fiduciary under any trust instrument or otherwise.

13. I/we hereby agree for the beneficiary for the life of the Minor Blocked – Coogan Trust Account and the statutory life of any cause of action involving any account to indemnify and hold harmless the Credit Union from any and all claims, suits, actions, damages, judgments, costs, charges, and expenses, including court costs and attorneys' fees, against any and all liability, loss, and damage of any nature whatsoever that the Credit Union shall or may sustain resulting from the establishment, maintenance, and transaction of any business on this Minor Blocked – Coogan Trust Account at this Credit Union. I/we agree to pay any necessary expenses, attorneys' fees, or costs incurred in the enforcement of this hold harmless and indemnity agreement.
14. Pursuant to Sections 6750-6753 of the California Family Code, trustees, who may be parents or guardians, may establish on behalf of minors "Coogan Accounts" at financial institutions, including credit unions, which consist of a certain percentage of a minor's gross earnings from certain professions. Applications to establish such accounts are often accompanied by a minimal amount provided by such trustees in anticipation that larger deposits will be made from the minor's anticipated gross earnings. Until such a subsequent deposit is made from the minor's gross earnings, however, the account is not a Coogan Account under California law and will be treated as a regular share account despite the fact that such account may be designated as a Coogan Account for classification purposes.
15. I/WE ACKNOWLEDGE AND AGREE THAT THIS MEMBERSHIP APPLICATION AFFECTS MY/OUR LEGAL RIGHTS. IF I/WE DESIRE ASSISTANCE OR ADVICE CONCERNING THIS MEMBERSHIP APPLICATION, I/WE SHOULD SEEK THE SERVICE OF AN ATTORNEY OR OTHER PROFESSIONAL PERSON.

**TAX IDENTIFICATION NUMBER
CERTIFICATION & BACKUP
WITHHOLDING INFORMATION**

By signing below, I/we certify under penalties of perjury that the Social Security Number/Tax ID Number shown above is the minor's correct Tax Identification Number and that the minor is not, unless designated below, subject to backup withholding because: (a) the minor is exempt from backup withholding; or (b) the minor has not been notified by the Internal Revenue Service (IRS) that the minor is subject to backup withholding as a result of a failure to report all interest or dividends; or (c) the IRS has notified the minor that the minor is no longer subject to backup withholding. I further certify that unless otherwise designated below, the minor is a U.S. person (including a U.S. resident alien).

- The minor is subject to backup withholding
 The minor is not a U.S. citizen or resident (complete IRS Form W-8BEN)

SIGNATURES:

X _____ X _____
 Trustee 1 Date Trustee 2 Date