

Mortgage Transfer Form for Primary and Joint Members

Date

Primary Member

Joint Member

Name

Name

Account Number

Account Number

Social Security Number

Social Security Number

I, the primary member, state that I am the primary member on this account and currently have the above mortgage. Being the primary member, interest paid on this mortgage is reported to the Internal Revenue Service with my Social Security number. I request changes be made to this Mortgage account so interest will be reported in the name of the joint member and account. By signing this request, I relinquish all rights to report any interest paid on this mortgage. I further understand this Mortgage account will be moved to the joint member account.

Signature (Primary)

Date

Notary

Date

I, the joint member, hereby accept the transfer of the above Mortgage account to my account. I understand all interest paid for this year and forward will be reported using my Social Security number. I also understand once this Mortgage account has been moved from the primary member's account it cannot be reinstated back to the above primary account.

Signature (Joint)

Date

Notary

Date

Instructions

1. Complete form.
2. Print and sign form.
3. Have form notarized.
4. Fax form to:
CEFCU Mortgage Department
309.633.3667



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