Manage Bank Account Form

Important information about this form:

- Fill out this form to add or change a bank account to this Embark account.
- The Account Owner or the Beneficiary must own the bank account connected to the Embark account.
- If you are filling out this form digitally (using Adobe Sign), the owner of the bank account listed in **Step 3** must be the Embark Account Owner. If the bank account is owned by someone other than the Embark Account Owner, please print this form and submit it via mail.
- You must wait 10 days from when you edit bank account information before you can make a withdrawal unless you provide a notary signature (Step 5).
- A notary signature is required for an Entity Account or an Account for which the individual completing the form is acting in a legal capacity as a representative of the Account Owner (**Step 5**).
- **IMPORTANT:** If you are submitting this form digitally (via Adobe Sign) you do not need to complete the notary acknowledgment (**Step 5**).

Need help?
Give us a call Monday – Friday from 6am – 5pm PT at **1-866-772-8464**

Individuals with speech or hearing disabilities may dial 711 to access Telecommunications Relay Service (TRS) from a telephone or TTY.

Mail the form to:
Embark
P.O. Box 534440
Pittsburgh, PA 15253-4440

Overnight Mail:
Embark
Attention: 534440
1350 Penn Avenue, Suite 102
Pittsburgh, PA 15222

1 Account information

_____

Name of Account Owner (First and last)

__ __ __ – __ __ __ – __ __ __ __

Account Owner's telephone number

__ __ __ __ __ __ __ __ __ __ __ __ __

Account number (May be 12 or 13 characters)

2 Manage bank account

What type of change do you want to make?

◯ Update existing bank account

◯ Add a new bank account

3 Bank account information

To make deposits and withdrawals with an ACH bank transfer, attach a voided check or copy of your bank statement showing the name, address, last 4 digits of the account number and complete the bank information below. Please use a paper clip for the check and do not staple.

What type of documentation are you including to verify this bank account?

◯ Voided check

◯ Bank statement

_____

Name on bank account
The Account Owner/Custodian or Beneficiary must own the bank account connected to the Plan account.

_____

Bank Account Holder Signature
(If different from Plan Account Owner/Custodian)

Bank account type ◯ Checking ◯ Savings

_____

Bank name

__ __ __ __ __ __ __ __ __

Bank routing number

_____

Bank account number

Need help?
You can find your bank information on the bottom of one of your checks here:

⑆ 000000000 ⑆ 000000000000 ⑈ 1000

Routing Number | Account Number

4 Sign the form

By signing this form, you're confirming that the information you've provided is true for the bank account.

You must wait 10 days from when you edit bank account information before you can make a withdrawal unless you get a notarization acknowledgement (**Step 5**).

If I have provided banking information in **Step 3**, I authorize the Plan to debit my bank account and to deposit such funds into my Plan account. I authorize the financial institution holding the bank account to debit without responsibility for the accuracy of the transaction. I further agree that neither the Plan nor its agents will be liable for any loss, liability, cost or expense for acting upon these instructions, except to the extent required by applicable law.

You should be aware that by providing banking information, you also authorize the Plan to automatically provide certain capabilities in connection with your account(s). This includes the ability to authorize withdrawals from your accounts via telephone or through this website provided your banking information has been on file for a minimum of 10 days. Do not provide your banking information if you do not wish to activate these capabilities. If you wish to remove these capabilities from your account(s), you must delete your banking information.

Signature of Account Owner/Custodian/Authorized Representative of Entity	**Date** (mm/dd/yyyy)

5 Notarization acknowledgement

Keep in mind that:

- If you are submitting this form digitally (via Adobe Sign) you do not need to complete the notary acknowledgment.
- You're providing the following information as underwritten certification that your signature is genuine.
- You cannot guarantee your own signature. You may be required to provide proof of your authority to act on behalf of the Account.

Only sign if you are in the presence of a notary public or other officer providing notarization.

The undersigned has read the foregoing in its entirety before signing. IN WITNESS WHEREOF, I have hereunto

set my hand this _____ day of _____ , 20 _____ .
Day (#) Month Year

_____
Signature of Account Owner/Authorized Representative of Entity

State of _____, County of _____

This instrument was acknowledged before me

☐ physical presence ☐ online notarization

on _____
Date (mm/dd/yyyy)

by _____
Name of person (First and last)

My term expires: _____
Date (mm/dd/yyyy)

Notary Public (Seal)

_____
Signature of Notary Public