

Navy Federal®
Business Servicing Form

- Change Entity Structure
- Change NAICS
- Change Nature of Business

(Instructions and General Information)

Note: For fastest processing, please review and follow all instructions. Complete only the section(s) applicable to the request. All owners must sign.

General Information

Any changes to business entity structure will require submission of additional or updated documentation to Navy Federal.

- Changing Business Entity Structure requires submission of Articles of Amendment or state-filed conversion documents and any additional documentation required for the specific business entity type.
- Navy Federal recognizes that the title of Business Entity documents may vary by U.S. state, county, and/or locality. Navy Federal may accept documents that it determines meet its documentation requirements.

Beneficial Owner Certification

To help the government fight financial crime, federal regulation requires certain financial institutions to obtain, verify, and record information about the beneficial owners of legal entity customers.

- If there is a change in entity structure, a new Certification Regarding Beneficial Owners of Legal Entity Customers (NFCU 98) form is required.

Signatory Authorization and Agreements

- Signatures must be provided by all business owners and entity owner representatives.

Submission Instructions

Online: Sign in to Online Banking and use the “Send Us a Message” option. Attach the completed form and supporting documentation.

INSTRUCTIONS: Complete only the section(s) applicable to your request. All owners must sign authorizing changes.
Please Note: Any changes to entity type or ownership will require updated business entity documents.

Current Information	
Business Name:	Tax ID No. (EIN or SSN):

New Business Information	
Change Business Entity Structure (Information will not be changed unless proper proof is received): ☐ Sole Proprietorship ☐ Partnership ☐ Corporation ☐ Sole-Member Limited Liability Company (LLC) ☐ Multi-Member Limited Liability Company (LLC)	
I have included the following as legal proof of existence of the business: ☐ Business License ☐ Articles of Incorporation ☐ Operating Agreement ☐ Articles of Amendment ☐ Fictitious Name Certificate (or Certificate of Assumed Name) ☐ Articles of Organization ☐ Corporate Bylaws ☐ Other ☐ Partnership Agreement ☐ IRS EIN Letter ☐ Articles of Amendment/Conversion Document ☐ Certificate of Good Standing	

New Nature of Your Business:	NAICS Code:
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To help the government fight financial crime, federal regulation requires certain financial institutions to obtain, verify, and record information about the beneficial owners of legal entity customers. This section must be completed when changing the structure of a legal entity.
Beneficial Owner Certification
Select one of the following: ☐ N/A – Business is a sole proprietorship, unincorporated association, or otherwise not applicable. ☐ Certification Regarding Beneficial Owners of Legal Entity Customers (NFCU 98) form attached.

Signatory Authorizations and Agreements		
Owner 1 Signature ▶	Printed Name	Date (MM/DD/YY)
Owner 2 Signature ▶	Printed Name	Date (MM/DD/YY)
Owner 3 Signature ▶	Printed Name	Date (MM/DD/YY)
Owner 4 Signature ▶	Printed Name	Date (MM/DD/YY)
As Representative for Entity Owner 1 Signature ▶	Printed Name	Date (MM/DD/YY)
As Representative for Entity Owner 2 Signature ▶	Printed Name	Date (MM/DD/YY)

