

Investment Request Form

Please send me information for the following savings or investment choices:

- Membership Application
- Share Certificate (CD)
- Money Market Account

IRA Accounts

- Rollover IRA Account
Publix Retiree Yes No
- Roth IRA Account
- Traditional IRA Accounts
- IRA Share Certificate
- Coverdell Educational Savings Account
(formerly *Educational IRA*)
- Estate & Financial Planning call: Compton, Kane, & Associates at 1-888-688-2454

Name _____

Are you a member of PEFCU?

- Not yet, please send Membership Application.
- Yes, account number _____

Street Address _____

City _____

State _____ Zip _____

Daytime Phone No. (_____) _____

Evening Phone No. (_____) _____



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