



Beneficiary Form

Designation of Payable on Death Beneficiary

- “Payable on Death” beneficiaries will be paid only if all owners of an account are deceased.
- Beneficiaries listed below will apply to all suffixes under the account number, except IRA accounts.
- If multiple beneficiaries are listed, unless specified otherwise, the funds will be distributed equally among them.
- A separate form must be filled out for each account number. All information is required in order to add a beneficiary.
- This form replaces any previous beneficiary designations.

Name: _____

Member Number: _____

Beneficiary #1

Name: _____ Social Security Number: _____ Percentage of Distribution: _____

Date of Birth: _____ Address: _____

Phone: _____ Relationship: _____

Beneficiary #2

Name: _____ Social Security Number: _____ Percentage of Distribution: _____

Date of Birth: _____ Address: _____

Phone: _____ Relationship: _____

Beneficiary #3

Name: _____ Social Security Number: _____ Percentage of Distribution: _____

Date of Birth: _____ Address: _____

Phone: _____ Relationship: _____

Beneficiary #4

Name: _____ Social Security Number: _____ Percentage of Distribution: _____

Date of Birth: _____ Address: _____

Phone: _____ Relationship: _____

Total Percentage of Distribution: _____
(Must be 100%)

Legal Trust - **A Legal Trust designation shall supersede any named individual beneficiary(ies).*

Trust Name: _____

Trustee: _____

Phone: _____

Primary Member Signature: _____

Date: _____

Joint Account Holder: _____

Date: _____