



Designation / Change of Beneficiary

Member Information (Please print or type)				
Primary Member Name:		Phone Number:		Member Number:
Joint Owner #1 Name:		Phone Number:		
Joint Owner #2 Name:		Phone Number:		
Primary Beneficiaries:				
1 – Beneficiary Name:		SSN:	DOB:	Relationship: Share %:
Address:			Phone:	
2 – Beneficiary Name:		SSN:	DOB:	Relationship: Share %:
Address:			Phone:	
3 – Beneficiary Name:		SSN:	DOB:	Relationship: Share %:
Address:			Phone:	
Contingent Beneficiaries:				
1 – Beneficiary Name:		SSN:	DOB:	Relationship: Share %:
Address:			Phone:	
2 – Beneficiary Name:		SSN:	DOB:	Relationship: Share %:
Address:			Phone:	
3 – Beneficiary Name:		SSN:	DOB:	Relationship: Share %:
Address:			Phone:	

I/We, the above-named Member(s)/Owner(s), hereby designate the above-named Beneficiary(ies) as the beneficiary (ies) on Account # _____. As such, on death of the last surviving Owner, any sums remaining on deposit not covered by a separate share agreement belong to the surviving Payable on Death (“POD”) beneficiary(ies). If there is more than one POD beneficiary, this share account, when paid, shall be paid in equal shares to each beneficiary. Any such payment made by the Credit Union shall satisfy the requirements of this Payable on Death provision, without necessity of determining whether any other person shall have an interest in the account, unless the Credit Union has been served with process restricting payment on the account in accordance with terms of such process. This account shall, during the lifetime of the sole owner or joint owners, be his/her/their property and under his/her/their sole control and this Designation of Payable on Death Beneficiary(ies) is revocable by the account owner(s) revoking the designation in writing, or changing the pay on death direction. If there is more than one owner, all owners must consent to a revocation or change of POD beneficiary(ies). This account: (1) is subject to the deduction from the account of all charges owing, withdrawals and the payment of all checks and drafts which clear this account in the regular course of business prior to a request by the POD beneficiary(ies) for payments; (2) includes all credit, interest and dividends earned on this account; and (3) is not subject to any amendment or change by will or other separate agreement. Owner(s) hereby grant a security interest in this account for all loans or other obligations to the Credit Union whether jointly or individually made. It is understood and agreed that subject to credit union policies and applicable state and federal laws, rules and regulations, all sums paid into the account may be pledged to the Credit Union as security for a loan.

Primary Member’s Signature

Joint Owner #1 Signature

Joint Owner #2 Signature

Date

Internal Use Only

Received Date: _____

Processed By: _____