

Individual(s) or entity(ies) who will receive the funds upon the death of all account owners. To name additional primary beneficiaries, include all information in this section on a separate sheet.

print the designation next to the name of each primary beneficiary (consult with your estate planning attorney before indicating this option).

Name of beneficiary (first, middle initial, last) or entity

Name of beneficiary (first, middle initial, last) or entity

Mailing address

Mailing address

City

State

ZIP code

City

State

ZIP code

Beneficiary's Social Security/taxpayer ID number

Beneficiary's Social Security/taxpayer ID number

Date of birth (mm/dd/yyyy)

Relationship

Percentage %

Date of birth (mm/dd/yyyy)

Relationship

Percentage %

3 SECONDARY BENEFICIARY(IES)

Secondary beneficiary:

Individual(s) or entity(ies) who will receive the funds upon the death of all account owners if all primary beneficiaries predeceased all account owners.

Beneficiary(ies) must be designated by name and the sum of the percentages for all secondary beneficiaries must equal 100%. Unless noted, we will assume equal distribution among secondary beneficiaries. To establish designations of lineal descendants or lineal descendants per stirpes, print the designation next to the name of each secondary beneficiary (consult with your estate planning attorney before indicating this option).

Name of beneficiary (first, middle initial, last) or entity

Name of beneficiary (first, middle initial, last) or entity

Mailing address

Mailing address

City

State

ZIP code

City

State

ZIP code