

Place your initials in the one box below that is next to the account you want to select.



## UNIFORM SINGLE-PARTY OR MULTIPLE-PARTY ACCOUNT SELECTION FORM NOTICE

INSTRUCTIONS: The type of account you select may determine how property passes on your death. Your will may not control the disposition of funds held in some of the following accounts.

Select one of the following accounts by placing your initials to the left of the account you selected:

\_\_\_\_\_ (1) SINGLE-PARTY ACCOUNT WITHOUT "P.O.D." (PAYABLE ON DEATH) DESIGNATION. The party to the account owns the account. On the death of the party, ownership of the account passes as a part of the party's estate under the party's will or by intestacy.

Enter the name of the party:

\_\_\_\_\_ (2) SINGLE-PARTY ACCOUNT WITH "P.O.D." (PAYABLE ON DEATH) DESIGNATION. The party to the account owns the account. On the death of the party, ownership of the account passes to the P.O.D. beneficiaries of the account. The account is not a part of the party's estate.

Enter the name of the party:

Enter the name or names of the P.O.D. beneficiaries:

\_\_\_\_\_ (3) MULTIPLE-PARTY ACCOUNT WITH RIGHT OF SURVIVORSHIP. The parties to the account own the account in proportion to the parties' net contributions to the account. The financial institution may pay any sum in the account to a party at any time. On the death of a party, the party's ownership of the account passes to the surviving parties.

Enter the names of the parties:

\_\_\_\_\_ (4) MULTIPLE-PARTY ACCOUNT WITH RIGHT OF SURVIVORSHIP AND P.O.D. (PAYABLE ON DEATH) DESIGNATION. The parties to the account own the account in proportion to the parties' net contributions to the account. The financial institution may pay any sum in the account to a party at any time. On the death the last surviving party, the ownership of the account passes to the P.O.D. beneficiaries.

Enter the names of the parties:

\_\_\_\_\_

\_\_\_\_\_ Enter the name or names of the P.O.D. beneficiaries:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ (5) TRUST ACCOUNT. The parties named as trustees to the account own the account in proportion to the parties' net contributions to the account. A trustee may withdraw funds from the account. A beneficiary may not withdraw funds from the account before all trustees are deceased. On the death of the last surviving trustee, the ownership of the account passes to the beneficiary. The trust account is not a part of a trustee's estate and does not pass under the trustee's will or by intestacy unless the trustee survives all of the beneficiaries and all other trustees.

Enter the name or names of the trustees:

\_\_\_\_\_

\_\_\_\_\_ Enter the name or names of the beneficiaries:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

I acknowledge that I have read each paragraph of this Notice. My initials are to the left of the account type that I want.

\_\_\_\_\_ Customer's Signature

\_\_\_\_\_ Customer's Handwritten Name

\_\_\_\_\_ Customer's Signature

\_\_\_\_\_ Customer's Handwritten Name

\_\_\_\_\_ Customer's Signature

\_\_\_\_\_ Customer's Handwritten Name

\_\_\_\_\_ Customer's Signature

\_\_\_\_\_ Customer's Handwritten Name