

Pay-On-Death Beneficiary Designation

To designate a Beneficiary or Beneficiaries on your account, please complete the information below (one form per account). Once this form has been completed and signed, you may return it to any Financial Partners branch or mail it to: Financial Partners Credit Union, 7800 E. Imperial Hwy, Downey, CA 90242, ATTN: Support Services. PLEASE NOTE: You may use this form to designate Beneficiaries on all accounts **except** IRAs and Trusts. To designate a Beneficiary on your IRA or Trust account, please visit any Financial Partners branch or call 800.950.7328 for assistance.

About you

Your Full Name _____
First Middle Last

Membership Account # _____

Please designate the beneficiaries listed below on the following accounts (the two-digit number is located next to the account name on your statement):

- | | |
|---|--|
| <input type="checkbox"/> All Accounts | <input type="checkbox"/> Checking: Two-Digit Number _____ |
| <input type="checkbox"/> Regular Share: Two-Digit Number _____ | <input type="checkbox"/> Money Market: Two-Digit Number _____ |
| <input type="checkbox"/> Side Share Savings: Two-Digit Number _____ | <input type="checkbox"/> Certificate: Three-Digit Number _____ |

Beneficiary #1

Beneficiary's Full Name _____
First Middle Last

Beneficiary's Home Address _____

City _____ State _____ Zip _____

Home Phone _____ Relationship _____

Date of Birth _____ Social Security # _____ Percentage _____%

Beneficiary #2

Beneficiary's Full Name _____
First Middle Last

Beneficiary's Home Address _____

City _____ State _____ Zip _____

Home Phone _____ Relationship _____

Date of Birth _____ Social Security # _____ Percentage _____%

This account is subject to the terms and conditions set forth in the Credit Union's disclosures. A pay-on-death (POD) account is an account payable on request to one or more Account Owner(s) during their lifetime and on the death of all Account Owners to one or more POD Beneficiaries. POD Beneficiaries have no rights to the funds in the Account during the lifetime of any Account Owner.

On death of the sole Account Owner or of the last surviving Account Owner:

- any funds remaining in the Account belong to the POD Beneficiary or Beneficiaries if surviving, or to the survivor of them if one or more die before the death of the sole Account Owner or the last surviving Account Owner;
- if two or more POD Beneficiaries survive, any funds remaining on deposit belong to them in equal and undivided shares unless the Account Signature Card expressly provides for different shares; and
- if two or more POD Beneficiaries survive, there is no right of survivorship in the event of death of a POD Beneficiary.

The Credit Union may require certain legal documents before releasing funds in the Account. Upon the death of the sole Account Owner or the last surviving Account Owner, payment on a POD account will be made to the Beneficiaries within a reasonable time. Until final payment is made, the Credit Union shall continue to operate the Account according to the terms of this Agreement. The terms of this Account may not be altered by will or other testamentary instrument.

Primary Member Signature

Date