ARDENT™ CREDIT UNION

Beneficiary/Trust Account

Account Information

Account Owner_____ Phone_____

Member Number_____ Last 4 digits of your Social Security Number_____

Email address_____ May we contact you by email? ☐ Yes ☐ No

Totten Trust/Beneficiary/POD Account

☐ Totten Trust/Beneficiary account- The owner(s) is/are trustee(s), and hereby designate the following beneficiary(ies)

☐ Pay on death- In the event of your death, you, the undersigned, a member of Ardent Credit Union hereby designate the following beneficiary(ies)

Name | Relationship to trustee | Social Security Number | Date of birth | ☐ All accounts, or

Address | Phone | A/C # | A/C # | A/C #

Name | Relationship to trustee | Social Security Number | Date of birth | ☐ All accounts, or

Address | Phone | A/C # | A/C # | A/C #

Name | Relationship to trustee | Social Security Number | Date of birth | ☐ All accounts, or

Address | Phone | A/C # | A/C # | A/C #

Trust Account/PODDesignation A Payable on Death (POD) account or trust account designation is an instruction to the Credit Union that a Single or Joint account so designated is payable to the owner(s) during his, her or their lifetime(s) and, when the last account owner dies, payable in equal amounts to any named and surviving POD or trust beneficiary/payee. Accounts payable to more than one surviving beneficiary/payee are owned jointly by such beneficiary/payee without rights of survivorship. Any POD or trust beneficiary/payee designation shall not apply to Individual Retirement Accounts (IRAs) which are governed by a separate beneficiary/payee designation. We are not obligated to notify any beneficiary/payee of the existence of any account or the vesting of the beneficiary/payee's interest in any account, except as otherwise provided by law.
I/We agree that the changes on this form amend the previously signed Membership form and are subject to all terms and conditions of membership in Ardent Credit Union.

Authorization and Agreement

Owner's signature | Date

Owner's signature | Date