

USPS FCU TRANSFER/PAY ON DEATH AGREEMENT

Check one: New TOD/POD Designation and Agreement Add one or more TOD/POD Beneficiaries
 Change TOD/POD Beneficiary(ies)* Remove one or more TOD/POD Beneficiaries

***WHEN CHANGING, ADDING, OR REMOVING BENEFICIARIES PLEASE RESTATE THE NAME(S) AND INFORMATION FOR CURRENT BENEFICIARY(IES) THAT WILL REMAIN.**

Account Owner(s): _____ Account Number: _____

The following beneficiary(ies) shall be transferred the above account assets upon death of the account owner(s):

| Name of Beneficiary | Address of Beneficiary | Relationship to Account Owner | SSN or TIN | Percentage |
|---|------------------------|-------------------------------|------------|------------|
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| NOTE: The total of all percentages must equal 100%. If the percentage column is left blank, equal percentages will be assumed. | | | % Total | |

THE FOLLOWING MUST BE COMPLETED IF MORE THAN ONE BENEFICIARY IS NAMED.

If any beneficiary listed above is not living at the death of the account owner(s), that beneficiary's percentage of the funds, securities and assets in the account shall (check only one):

- Pass to any surviving beneficiaries in the ratio based upon the surviving beneficiaries above stated percentages.
 Pass to the estate of the owner(s).

IF NEITHER BOX IS CHECKED, THE FUNDS, SECURITIES AND ASSETS IN THE ACCOUNT SHALL PASS TO THE ESTATE OF THE OWNER(S). This Agreement does not provide for contingent, substitute or successor beneficiaries. Any attempt to alter or amend this Agreement to provide for contingent, substitute or successor beneficiaries shall render this entire Agreement null and void. Account owner(s) hereby agree to the terms of this Agreement and acknowledge receipt of a copy of the Agreement.

PATRIOT Act Notice: To help the government fight the funding of terrorism and money laundering activities Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who we do business with. When you designate a beneficiary we will ask for the name, address, date of birth, and other information that will allow us to identify your beneficiary. This Transfer on Death/Pay on Death designation form should be accompanied by a copy of your beneficiary's non-expired US Government issued photo ID (e.g. Driver's License, Passport, or US Military ID).

If you are unable to provide a copy of a non-expired US Government issued photo ID for the person you wish to name as your beneficiary you may still designate that person as your beneficiary. However, USPS FCU will not be able to transfer or pay the funds to your beneficiary until your beneficiary's identity has been verified per the requirements of the US PATRIOT Act.

Account Owner (Primary Member) Signature

Date

Joint Owner Signature

Date

For Employee Use Only

MIP for Beneficiary Attached

MIP Form for Beneficiary NOT Attached

Revised June 2015