

For each beneficiary listed, please provide all information.

Share % must total 100%. Only whole numbers please.

**When to use this form:**

- To establish or update primary beneficiaries.
- To establish or update contingent beneficiaries.

## 1 Account Owner Information

Owner #1 Name \_\_\_\_\_

Owner #2 Name (if applicable) \_\_\_\_\_

## 2 Primary Beneficiaries

Name or Name of Trust \_\_\_\_\_

Mailing Address \_\_\_\_\_

Phone # \_\_\_\_\_ Email \_\_\_\_\_

SSN/Tax ID # \_\_\_\_\_ Date of Birth \_\_\_\_\_

Spouse    Non-Spouse    Trust    Other Entity   Share % \_\_\_\_\_

Name or Name of Trust \_\_\_\_\_

Mailing Address \_\_\_\_\_

Phone # \_\_\_\_\_ Email \_\_\_\_\_

SSN/Tax ID # \_\_\_\_\_ Date of Birth \_\_\_\_\_

Spouse    Non-Spouse    Trust    Other Entity   Share % \_\_\_\_\_

Name or Name of Trust \_\_\_\_\_

Mailing Address \_\_\_\_\_

Phone # \_\_\_\_\_ Email \_\_\_\_\_

SSN/Tax ID # \_\_\_\_\_ Date of Birth \_\_\_\_\_

Spouse    Non-Spouse    Trust    Other Entity   Share % \_\_\_\_\_

Name or Name of Trust \_\_\_\_\_

Mailing Address \_\_\_\_\_

Phone # \_\_\_\_\_ Email \_\_\_\_\_

SSN/Tax ID # \_\_\_\_\_ Date of Birth \_\_\_\_\_

Spouse    Non-Spouse    Trust    Other Entity   Share % \_\_\_\_\_

For each beneficiary listed, please provide all information.

Share % must total 100%. Only whole numbers please.

**3 Contingent Beneficiaries**

Name or Name of Trust \_\_\_\_\_  
 Mailing Address \_\_\_\_\_  
 Phone # \_\_\_\_\_ Email \_\_\_\_\_  
 SSN/Tax ID # \_\_\_\_\_ Date of Birth \_\_\_\_\_  
 Spouse    Non-Spouse    Trust    Other Entity   Share % \_\_\_\_\_

Name or Name of Trust \_\_\_\_\_  
 Mailing Address \_\_\_\_\_  
 Phone # \_\_\_\_\_ Email \_\_\_\_\_  
 SSN/Tax ID # \_\_\_\_\_ Date of Birth \_\_\_\_\_  
 Spouse    Non-Spouse    Trust    Other Entity   Share % \_\_\_\_\_

Name or Name of Trust \_\_\_\_\_  
 Mailing Address \_\_\_\_\_  
 Phone # \_\_\_\_\_ Email \_\_\_\_\_  
 SSN/Tax ID # \_\_\_\_\_ Date of Birth \_\_\_\_\_  
 Spouse    Non-Spouse    Trust    Other Entity   Share % \_\_\_\_\_

Name or Name of Trust \_\_\_\_\_  
 Mailing Address \_\_\_\_\_  
 Phone # \_\_\_\_\_ Email \_\_\_\_\_  
 SSN/Tax ID # \_\_\_\_\_ Date of Birth \_\_\_\_\_  
 Spouse    Non-Spouse    Trust    Other Entity   Share % \_\_\_\_\_

**4 Account Authorization**

\_\_\_\_\_  
 Account Owner #1 Signature Today's Date (mm/dd/yyyy)

\_\_\_\_\_  
 Account Owner #2 Signature (if applicable) Today's Date (mm/dd/yyyy)