

An Educational Systems Federal Credit Union individual or joint account may have a Payable on Death (POD) designation. Upon the death of the account owner(s), the funds in the account are disbursed to the then-living Payable on Death payee(s) designated on the account. The funds in the account are generally not part of account owner(s) estate. This form is used to add or remove multiple Payable on Death designations and supersedes any previous account Payable on Death (POD) agreements. To designate specific distribution allocations, include a percentage for each POD. The total for all designations must equal 100%. If a percentage is not assigned, distribution will be made in equal shares.

ACCOUNT OWNERSHIP

Account number _____

Primary member name _____

Primary member signature _____ Date _____

PAYABLE ON DEATH (POD)

Name (First, Middle Initial, Last) _____ Add POD Remove POD

Social Security Number _____ Date of Birth _____ Percentage _____

Name (First, Middle Initial, Last) _____ Add POD Remove POD

Social Security Number _____ Date of Birth _____ Percentage _____

Name (First, Middle Initial, Last) _____ Add POD Remove POD

Social Security Number _____ Date of Birth _____ Percentage _____

Name (First, Middle Initial, Last) _____ Add POD Remove POD

Social Security Number _____ Date of Birth _____ Percentage _____

For Credit Union Use Only		
Date received	Date processed	Teller number