

PAYABLE ON DEATH (POD) BENEFICIARY DESIGNATION FORM

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To designate a POD beneficiary or beneficiaries on your account, please complete the information below. PLEASE NOTE: You may use this form to designate a beneficiary or beneficiaries on all accounts except IRAs, HSAs, ESAs, or Trusts. To designate a beneficiary or beneficiaries on your IRA, HSA, ESA, or Trust account, please call (317) 276-2105 or (800) 621-2105.

Primary Member Information

First Name _____ MI _____ Last Name _____

List Impacted Account Numbers or Choose All Accounts: _____

 All Accounts

Beneficiary Information

THIS FORM WILL REVOKE ALL PRIOR POD BENEFICIARY DESIGNATIONS MADE BY YOU FOR THE ACCOUNT(S) LISTED ABOVE. Please be sure to list all beneficiaries, including existing beneficiaries currently designated on your account(s). Multiple beneficiaries will be paid in equal shares. LDPS means Lineal Descendants Per Stirpes. This impacts POD beneficiary or beneficiaries as follows: If the "LDPS" box is checked and that POD beneficiary predeceases the last account owner to die, that POD beneficiary's share will be divided between their surviving children and grandchildren. If that POD beneficiary had no surviving children or grandchildren, that POD beneficiary's share will be divided between all surviving POD beneficiaries. If the "No LDPS" box is checked and that POD beneficiary predeceases the last account owner to die, that POD beneficiary's share will be divided equally between all surviving POD beneficiaries.

 LDPS
 No LDPS

Full Name _____ Date of Birth _____ Social Security # _____ Relationship _____

 LDPS
 No LDPS

Full Name _____ Date of Birth _____ Social Security # _____ Relationship _____

 LDPS
 No LDPS

Full Name _____ Date of Birth _____ Social Security # _____ Relationship _____

 LDPS
 No LDPS

Full Name _____ Date of Birth _____ Social Security # _____ Relationship _____

Signatures

I/we understand this account is subject to the terms and conditions in the Membership Agreement and Deposit Account Terms & Conditions. A POD account is payable to the owner(s) of the account during their lifetime, and upon the death of the last owner is payable to the beneficiary or beneficiaries they designated. The beneficiary or beneficiaries do not have an ownership interest in the account and have no control of the account. A POD designation is ineffective unless it is signed by all owners of an account.

 X _____
 Primary Owner Signature _____ Date _____

 X _____
 Joint Owner Signature _____ Date _____