

# Uniform Single-Party or Multiple-Party Account Selection Form Notice

## Description of Account(s):

The type of account you select may determine how property passes on your death. Your will may not control the disposition of funds held in some of the following accounts. You may choose to designate one or more convenience signers on an account, even if the account is not a convenience account. A designated convenience signer may make transactions on your behalf during your lifetime, but does not own the account during your lifetime. The designated convenience signer owns the account on your death only if the convenience signer is also designated as a P.O.D. payee or trust account beneficiary.

Select one of the following accounts by placing your initials next to the account selected:

**1. Single-Party Account Without "P.O.D." (Payable on Death)**

**Designation.** The party to the account owns the account. On the death of the party, ownership of the account passes as a part of the party's estate under the party's will or by intestacy.

Enter the name of the party:

Enter the name(s) of the convenience signer(s), if you want one or more convenience signers on this account:

**2. Single-Party Account With "P.O.D." (Payable on Death)**

**Designation.** The party to the account owns the account. On the death of the party, ownership of the account passes to the P.O.D. beneficiaries of the account. The account is not a part of the party's estate.

Enter the name of the party:

**Enter the name(s), address(es) and SSN(s) of the P.O.D. beneficiaries:**

**Enter the name(s) of the convenience signer(s), if you want one or more convenience signers on this account:**

**3. Multiple-Party Account Without Right of Survivorship.** The parties to the account own the account in proportion to the parties' net contributions to the account. The financial institution may pay any sum in the account to a party at any time. On the death of a party, the party's ownership of the account passes as a part of the party's estate under the party's will or by intestacy.

Enter the names of the parties:

**Enter the name(s) of the convenience signer(s), if you want one or more convenience signers on this account:**

**4. Multiple-Party Account With Right of Survivorship.** The parties to the account own the account in proportion to the parties' net contributions to the account. The financial institution may pay any sum in the account to a party at any time. On the death of a party, the party's ownership of the account passes to the surviving parties.

Enter the names of the parties:

**Enter the name(s) of the convenience signer(s), if you want one or more convenience signers on this account:**

**5. Multiple-Party Account With Right of Survivorship and P.O.D (Payable on Death) Designation.** The parties to the account - own the account in proportion to the parties' net contributions to the account. The financial institution may pay any sum in the account to a party at any time. On the death of the last surviving party, the ownership of the account passes to the P.O.D. beneficiaries.

Enter the names of the parties:

Enter the name(s), address(es) and SSN(s) of the P.O.D. beneficiaries:

Enter the name(s) of the convenience signer(s), if you want one or more convenience signers on this account:

**6. Convenience Account.** The parties to the account own the account. One or more convenience signers to the account may make account transactions for a party. A convenience signer does not own the account. On the death of the last surviving party, ownership of the account passes as a part of the last surviving party's estate under the last surviving party's will or by intestacy. The financial institution may pay funds in the account to a convenience signer before the financial institution receives notice of the death of the last surviving party. The payment to a convenience signer does not affect the parties' ownership of the account.

Enter the names of the parties:

Enter the name(s) of the convenience signer(s):

**7. Trust Account.** The parties named as trustees to the account own the account in proportion to the parties' net contributions to the account. A trustee may withdraw funds from the account. A beneficiary may not withdraw funds from the account before all trustees are deceased. On the death of the last surviving trustee, the ownership of the account passes to the beneficiary. The trust account is not a part of a trustee's estate and does not pass under the trustee's will or by intestacy, unless the trustee survives all of the beneficiaries and all other trustees.

Enter the name or names of the trustees:

Enter the name(s), address(es) and SSN(s) of the beneficiaries:

Enter the name(s) of the convenience signer(s), if you want one or more convenience signers on this account:

**Acknowledgement.** I acknowledge that I received disclosure of the ownership rights for each of the accounts listed above and affirm that I selected the account type next to which my initials are found.

---

Signature	Date	Signature	Date
-----------	------	-----------	------

---

Signature	Date	Signature	Date
-----------	------	-----------	------