

UNIFORM SINGLE-PARTY OR MULTIPLE-PARTY ACCOUNT FORM

Account Number _____

Date _____

PARTIES [Name One or More Parties]:

OWNERSHIP [Select One and Initial]:

_____ SINGLE-PARTY ACCOUNT

_____ MULTIPLE-PARTY ACCOUNT

Parties own account in proportion to net contributions unless there is clear and convincing evidence of a different intent.

_____ I agree that this account will be jointly owned

_____ I agree that this account will be jointly owned

_____ I agree that this account will be jointly owned

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RIGHTS AT DEATH [Select One and Initial]:

_____ **SINGLE-PARTY ACCOUNT**
At death of party, ownership passes as part of party's estate.

_____ SINGLE-PARTY ACCOUNT WITH POD (PAY ON DEATH) DESIGNATION
[Name One or More Beneficiaries]:

At death of party, ownership passes to POD beneficiaries and is not part of party's estate.

_____ **MULTIPLE-PARTY ACCOUNT WITH RIGHT OF SURVIVORSHIP**
At death of party, ownership passes to surviving parties.

_____ MULTIPLE-PARTY ACCOUNT WITH RIGHT OF SURVIVORSHIP AND POD (PAY ON DEATH) DESIGNATION

[Name One or More Beneficiaries]:

At death of last surviving party, ownership passes to POD beneficiaries and is not part of last surviving party's estate.

_____ MULTIPLE-PARTY ACCOUNT WITHOUT RIGHT OF SURVIVORSHIP

At death of party, deceased party's ownership passes as part of deceased party's estate.

AGENCY (POWER OF ATTORNEY) DESIGNATION [Optional]

Agents may make account transactions for parties but have no ownership or rights at death unless named as POD beneficiaries.

[To Add Agency Designation to Account, Name One or More Agents]:

[Select One and Initial]:

_____ AGENCY DESIGNATION SURVIVES DISABILITY OR INCAPACITY OF PARTIES

_____ AGENCY DESIGNATION TERMINATES ON DISABILITY OR INCAPACITY OF PARTIES