

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 wholly and jointly owned by all parties**

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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.

Do you intend for the sum remaining upon your death to belong to the surviving party or parties?

Yes

No

**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.

Do you intend for the sum remaining upon your death to belong to the surviving party or parties?

Yes

No

MULTIPLE-PARTY ACCOUNT WITHOUT RIGHT OF SURVIVORSHIP

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

Do you intend for the sum remaining upon your death to belong to the surviving party or parties?

Yes

No

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. Agents are not required under statute to have court granted powers of attorney.

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

[Select One and Sign]:

To be signed by either the account owner or an individual with court granted powers of attorney.

AGENCY DESIGNATION SURVIVES DISABILITY OR INCAPACITY OF PARTIES

AGENCY DESIGNATION TERMINATES ON DISABILITY OR INCAPACITY OF PARTIES
