



IN TRUST FOR (ITF), TOTTEN TRUST BENEFICIARY ADDENDUM FORM

Please use this form to designate ITF, Totten Trust Beneficiaries for the account(s) listed below.

- A separate form must be used for each account an ITF, Totten Trust beneficiary is designated for if account ownership differs.
- All owners of the account must sign to designate an ITF, Totten Trust Beneficiary.
- An ITF, Totten Trust Beneficiary cannot be added to a business account, unless the business structure is a sole proprietorship.
- In all instances, the most recent ITF, Totten Trust Beneficiary designation will supersede any previous designations.
- Attach additional pages, signing and dating each, if there are more than two ITF, Totten Trust Beneficiaries being designated.
- Before listing an Organization as an ITF, Totten Trust Beneficiary, it is highly recommended they are contacted to provide proper contact information and provide them with all information they may need to accept the funds.

Account Number(s) _____

Account Owner(s) Name(s) _____

Account Owner(s) Member Number(s) _____

In Trust For (ITF), Totten Trust Beneficiary(ies) will own the designated account funds listed above in the event of the death of all account holders. If two or more ITF, Totten Trust Beneficiaries are named and survive the death of all account owners, the account balance will be divided equally between all ITF, Totten Trust Beneficiaries.

Remove all current In Trust For (ITF), Totten Trust Beneficiary(ies) and do not add any new beneficiaries.

ITF, Totten Trust Individual Beneficiary Information

Name _____ DOB _____
SSN/Tax ID _____ Phone _____ Relationship _____
Address _____

Name _____ DOB _____
SSN/Tax ID _____ Phone _____ Relationship _____
Address _____

ITF, Totten Trust Organization Beneficiary Information

Name _____ Phone _____
Tax ID _____ Contact Name _____
Address _____

Name _____ Phone _____
Tax ID _____ Contact Name _____
Address _____

Account Owner Signature _____ Date _____

Account Owner Signature _____ Date _____

Account Owner Signature _____ Date _____

Team Member Name _____ Date Accepted _____ Page ___ of ___