



Adding a Beneficiary to an Account

Member Name	
Account Number(s)	
<u>Beneficiary #1</u>	
Beneficiary's Name	
SSN	
Address	
Phone	
Date of Birth	
Relationship	
<u>Beneficiary #2</u>	
Beneficiary's Name	
SSN	
Address	
Phone	
Date of Birth	
Relationship	

Please add the above named beneficiary(s) to:

ALL accounts and sub accounts
Only to Suffix(s) _____

Member Signature _____

Date _____

<u>Office Use Only</u>					
<u>Received By</u>	<u>Added to GOLD By</u>	<u>Comment By</u>	<u>Tracker By</u>	<u>OFAC Scan Completed</u>	<u>Date</u>
<u>Verified By</u>		<u>Archived By</u>		<u>Date</u>	