

Transfer on death is a form of account registration which for a custodial account allows the sole owner, the last surviving joint tenant, and each tenant in common to transfer upon their death the ownership of the account, or in the case of a tenant in common that tenant's ownership interest in the account, to one or more designated beneficiaries without going through probate or being subject to the deceased person's will. A beneficiary may be removed or changed by the current sole owner or tenant without the consent of the beneficiary upon a written direction delivered to the Custodian. **This form should be used to designate your account to be registered for Transfer on Death (TOD) to a beneficiary.**

Please print after completion. For assistance with this application, please contact a Client Service Specialist at 800.258.7878. (Hours: Monday - Friday, 8:00 am to 4:30 pm Central time.)

A Account Owner's Information

Select whether you are a New Account Registration or are making a change to an existing Registration.

New Account Registration **Existing Registration**

Enter Account Owner's full name.

► First: _____ Middle: _____ Last: _____

Only enter an account number if this is for an existing account.

► Millennium Account No.: _____ Social Security No.: _____

Address: _____

City: _____ State: _____ Zip: _____

Joint Account Owner's Name: _____

Joint Account Owner's Social Security No.: _____

B Beneficiary Designation

"Transfer on Death" will be part of the legal registration and will appear on statements.

Enter full name of beneficiary.

► Beneficiary Name: _____

Social Security No.: _____ Date of Birth: _____

Relationship to Account Owner: _____

Address: _____

City: _____ State: _____ Zip: _____

C Account Owner's Acknowledgement And Signature

I certify that the information contained herein is true and accurate to the best of my knowledge.

Account Owner's Signature: _____ Date: _____

Joint Account Owner's Signature: _____ Date: _____

