PSECU℠

CONVERT EXISTING GENERAL MEMBERSHIP ACCOUNT
TO TENTATIVE TRUST ACCOUNT

Use this form to convert your existing account a Tentative Trust Account. You may not add a joint owner with this form.

The Tentative Trust is revocable and the Member can make changes on the account at anytime. Beneficiaries can be designated on the account to be paid upon the Member's death by the percentage indicated for each beneficiary or equally based on the number of beneficiaries if no percentage is provided. If designated, the total percentage must equal 100%.

ACCOUNT NUMBER _____

MEMBER NAME _____

EXISTING JOINT OWNER (this person must already be a joint owner on the account) _____

EXISTING JOINT OWNER (this person must already be a joint owner on the account) _____

BENEFICIARIES

NAME OF BENEFICIARY _____

SOCIAL SECURITY NUMBER _____

RELATIONSHIP TO PRIMARY APPLICANT _____

DATE OF BIRTH: _____/_____/_____

PERCENTAGE FOR BENEFICIARY 1 _____

NAME OF BENEFICIARY _____

SOCIAL SECURITY NUMBER _____

RELATIONSHIP TO PRIMARY APPLICANT _____

DATE OF BIRTH: _____/_____/_____

PERCENTAGE FOR BENEFICIARY 2 _____

NAME OF BENEFICIARY _____

SOCIAL SECURITY NUMBER _____

RELATIONSHIP TO PRIMARY APPLICANT _____

DATE OF BIRTH: _____/_____/_____

PERCENTAGE FOR BENEFICIARY 3 _____

NAME OF BENEFICIARY _____

SOCIAL SECURITY NUMBER _____

RELATIONSHIP TO PRIMARY APPLICANT _____

DATE OF BIRTH: _____/_____/_____

PERCENTAGE FOR BENEFICIARY 4 _____

_____   _____   _____/_____/_____
MEMBER'S NAME *(Please print.)*   **MEMBER'S SIGNATURE** *(Please sign in ink.)*   **DATE**

Mail or fax completed form to:
P.O. BOX 67009, HARRISBURG, PA 17106-7009 • FAX 717.720.1234 • APPLICATIONP@PSECU.COM

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