

# CAHP Credit Union Beneficiary Designation/Change Form

Please Print or Type

\_\_\_\_\_  
Member Name

\_\_\_\_\_  
Membership Number

## Designation of Beneficiary *(Revocable; see below for complete instructions)*

**Beneficiary(ies) - % Column MUST total 100%**

%	Name	Mailing Address	Relationship	Birth Date	SSN

This beneficiary designation overrides all previous designations for this membership account. If you have more than one membership account, you must fill out a separate Beneficiary Designation/Change Form for each membership account.

## Member/Owner's Signature

(This beneficiary designation is not effective unless signed)

X \_\_\_\_\_  
Signature

\_\_\_\_\_  
Date (mm/dd/yyyy)

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## General Instructions

A beneficiary can be a person, trust, charity, or your estate. Write only one beneficiary on each line. Make sure you write the full names of all beneficiaries. For example, if you name your children as beneficiaries, DO NOT merely write "children" on one of the lines; instead, write the full names of all your children on separate lines.

DO NOT name a "joint account" holder as a beneficiary. Account ownership automatically transfers to the joint owner(s) upon the death of the "primary account" holder/member.

Please return completed form to [access24@cahpcu.org](mailto:access24@cahpcu.org)

## Order of Payment

For "individual accounts," upon an account owner's death, the account will be payable to the beneficiary(ies) listed unless the beneficiary(ies) has(have) predeceased the account owner.

For "joint accounts," upon the death of all account holders, the account will be payable to the beneficiary(ies) listed unless the beneficiary(ies) has(have) predeceased the account owner.