

Stock No. 11123

W.B.A. 382 (1) (8/09)

©Wisconsin Bankers Association 2009

P.O.D. BENEFICIARY DESIGNATION (AND REVOCATION) (To cover only one account — Use additional forms for other accounts)



Title of Account	Account or Certificate Number
Bank Name	Date of Designation

CHOOSE
ONLY
ONE

☐ INDIVIDUAL
☐ JOINT
☐ MARITAL

TYPE OF ACCOUNT — MARK WITH AN "X"
ONLY ONE SIGNATURE REQUIRED
FOR PAYMENT OR WITHDRAWAL

☐ SAVINGS
☐ CHECKING
☐ CERTIFICATE OF DEPOSIT
☐ OTHER _____

☐ "NOW"
☐ MMDA

The undersigned Depositor(s) designate the following beneficiaries as the **ONLY** beneficiaries for this account, hereby revoking any other P.O.D. beneficiary designations for this account:

Full Legal Name

Relationship

Percentage of Sums to be Distributed*

For Marital Accounts Only
 Beneficiary of Husband Beneficiary of Wife
 (If both, check both)

_____	_____	_____ %	<input type="checkbox"/>	_____	<input type="checkbox"/>	_____
(Address)	(Taxpayer Identification Number)			Initials		Initials
_____	_____	_____ %	<input type="checkbox"/>	_____	<input type="checkbox"/>	_____
(Address)	(Taxpayer Identification Number)			Initials		Initials
_____	_____	_____ %	<input type="checkbox"/>	_____	<input type="checkbox"/>	_____
(Address)	(Taxpayer Identification Number)			Initials		Initials
_____	_____	_____ %	<input type="checkbox"/>	_____	<input type="checkbox"/>	_____
(Address)	(Taxpayer Identification Number)			Initials		Initials
_____	_____	_____ %	<input type="checkbox"/>	_____	<input type="checkbox"/>	_____
(Address)	(Taxpayer Identification Number)			Initials		Initials
_____	_____	_____ %	<input type="checkbox"/>	_____	<input type="checkbox"/>	_____
(Address)	(Taxpayer Identification Number)			Initials		Initials
_____	_____	_____ %	<input type="checkbox"/>	_____	<input type="checkbox"/>	_____
(Address)	(Taxpayer Identification Number)			Initials		Initials
_____	_____	_____ %	<input type="checkbox"/>	_____	<input type="checkbox"/>	_____
(Address)	(Taxpayer Identification Number)			Initials		Initials

100 %
Total

*The total of the percentages must equal 100%. If the percentages of the sums to be distributed are left blank for all beneficiaries listed in this Designation, Bank shall distribute an equal amount of the sums to be distributed to each of the designated beneficiaries.

The undersigned agree to the Additional Provisions on the reverse side.

☒ IF CHECKED, THIS ACCOUNT/CERTIFICATE OF DEPOSIT IS OWNED BY THE DEPOSITOR NAMED HEREON. UPON THE DEATH OF SUCH DEPOSITOR, OWNERSHIP PASSES TO THE P.O.D. BENEFICIARY(IES) NAMED HEREON.

☐ IF CHECKED, THIS ACCOUNT/CERTIFICATE OF DEPOSIT IS JOINTLY OWNED BY THE DEPOSITORS NAMED HEREON. UPON THE DEATH OF ANY OF THEM OWNERSHIP PASSES TO THE SURVIVOR(S). UPON THE DEATHS OF ALL SUCH DEPOSITORS, OWNERSHIP PASSES TO THE P.O.D. BENEFICIARY(IES) NAMED HEREON.

☐ IF CHECKED, THIS ACCOUNT/CERTIFICATE OF DEPOSIT IS OWNED AS A MARITAL ACCOUNT BY THE PARTIES NAMED HEREON. UPON THE DEATH OF EITHER OF THEM, 50% OF THE SUMS ON DEPOSIT ARE OWNED BY THE SURVIVOR AND 50% ARE OWNED BY THE P.O.D. BENEFICIARY(IES) NAMED HEREON BY THE DECEASED PARTY.

Bank Rep. Initials

Depositor's Signature

Depositor's Signature

REVOCATION

Depositors may revoke the P.O.D. beneficiary designation above by either (a) signing the revocation below or (b) completing a new WBA 382 P.O.D. Beneficiary Designation. Unless the account is a marital account, each Depositor must sign the revocation below. If a marital account, only the Depositor who made the designation above must sign the revocation. Revised or new P.O.D. designations can only be made on a new WBA 382. Any such change is not effective until an original or copy thereof is received by Bank.

This P.O.D. Designation is Revoked in its Entirety

Depositor's Signature	Date
Depositor's Signature	Bank Rep. Initials

ADDITIONAL PROVISIONS

1. Distributions. If multiple beneficiaries are designated and a percentage of sums to be distributed is designated for at least one beneficiary, but Depositor fails to indicate a percentage of sums to be distributed to one or more of the beneficiaries, Bank shall distribute to each such beneficiary without an indication of a percentage share, an equal amount of the sums to be distributed not otherwise designated for a specific beneficiary. If multiple beneficiaries are designated and the percentages of sums to be distributed to each is designated, but the total of the percentages designated is less than or exceeds 100%, the sums distributed to each beneficiary shall be adjusted upward or downward, as applicable, by the same dollar amount, so that the total amount distributed equals 100%.

2. Reservation of Rights. The rights to change or revoke all designations made in this form are reserved by Depositor(s).

3. Payment to P.O.D. Beneficiaries. Payments shall be made to beneficiaries only upon receipt of evidence satisfactory to Bank of the death of all Depositors, or a spouse for a marital account, and subject to Wisconsin and Federal Statutes and Regulations. A beneficiary is not required to survive the death by any specified period.

The P.O.D. beneficiaries who survive the Depositor for other than a marital account (or the survivor if more than one Depositor) shall be entitled to any sums remaining on deposit in the percentages set forth on the reverse side of this form. The P.O.D. beneficiaries of a spouse for a marital account who survive that spouse shall be entitled to 50% of the sums remaining on deposit in the percentages set forth on the reverse side of this form. The share of a P.O.D. beneficiary who does not so survive shall be paid in equal shares to the P.O.D. beneficiaries who do so survive. If none of the P.O.D. beneficiaries do so survive, (a) any sums remaining on deposit shall be paid to the estate of the Depositor for an individual account, (b) any sums remaining on deposit shall be paid to the Depositor(s) who survives, if any, or the estate of the last Depositor to die, for a joint account, and (c) 50% of the sums remaining on deposit shall be paid to the estate of the Depositor and 50% of the sums remaining on deposit shall be paid to the Depositor(s) who survives, if any, or the estate of the last Depositor to die, for a marital account.

4. Minor P.O.D. Beneficiaries. Payments to minor P.O.D. beneficiaries (those under 18 years of age) may only be made in accordance with Chapter 880 of the Wisconsin Statutes as amended or renumbered from time to time.