

## TOTTEN TRUST DESIGNATION

Use this form to *add* beneficiaries to your Totten Trust account. To *change* beneficiaries to an existing Totten Trust account, you must (1) first complete a [Totten Trust Revocation](#) to revoke *all* current beneficiaries and (2) next complete this Totten Trust Designation to designate your new beneficiaries. To add a joint member/trustee to an existing account, you must complete a [CEFCU Signature Card](#) and this Totten Trust Designation Form.

- STEP 1:** Enter your CEFCU account number.
- STEP 2:** Check box and enter the suffix (required for certificates) for each account you wish to add beneficiaries.
- STEP 3:** List names of trustees/co-trustees currently on the account.
- STEP 4:** Complete all beneficiary information.  
Name, address, Social Security Number, date of birth, and relationship to trustee are *required*. If you have more than 6 beneficiaries please use 2 forms.
- STEP 5:** Print the form.
- STEP 6:** All current trustees must sign the form. Beneficiary signature is not required.
- STEP 7:** Mail completed form to:

**CEFCU**  
**P.O. Box 1715**  
**Peoria, IL 61656-1715**



For Credit Union Use Only	
Savings Acct. #	_____
ID#	_____
Date	_____
Office	_____ Initials _____

## TOTTEN TRUST DESIGNATION

The undersigned, being the owner(s) of CEFCU Account No. \_\_\_\_\_ agree(s) that the following account(s) shall be held in my/our name(s) as trustee(s) for the beneficiary(ies) designated, in trust, in accordance with the Illinois Trust and Payable on Death Account Act. The account(s) is/are Totten Trust account(s) and will be governed by the applicable terms and conditions of CEFCU's Deposit Account Agreement and the applicable provisions of the Illinois Trust and Payable on Death Accounts Act now in effect or as hereafter amended from time to time. If a My Save Certificate account is included in this Designation, this Designation will apply to: (s) any additional My Save Certificate(s) opened when you deposit more than the allowed maximum deposits to that account; and, (b) any regular certificate(s) that account is automatically renewed to when that account has the maximum deposits at maturity. All references to Primary Member and Joint Member(s), if any, in the Signature Card shall refer to the undersigned trustee(s).

**CHECK THE BOX AND INSERT THE SUFFIX FOR EACH ACCOUNT YOU WISH TO DESIGNATE A TOTTEN TRUST.**

*(Trustee(s) must be the same on all designated accounts.)*

<input type="checkbox"/>	Savings Account	Suffix _____
<input type="checkbox"/>	Checking Account	Suffix _____
<input type="checkbox"/>	IMMA (IMMA)	Suffix _____
<input type="checkbox"/>	Certificate(s)	Suffix _____
<input type="checkbox"/>	My Save Certificate(s)	Suffix _____

_____ Trustee (please print)	_____ Trustee (signature)	_____ Date
_____ Co-Trustee I (please print)	_____ Co-Trustee I (signature)	_____ Date
_____ Co-Trustee II	_____ Co-Trustee II (signature)	_____ Date

**Beneficiary I**

_____ Name	_____ Social Security #
_____ Address	_____ Date of Birth
_____	_____ Relationship to Trust

**Beneficiary II**

_____ Name	_____ Social Security #
_____ Address	_____ Date of Birth
_____	_____ Relationship to Trust

**ADDITIONAL BENEFICIARIES**

**Beneficiary III**

Name	Social Security #
Address	Date of Birth
	Relationship to Trust

**Beneficiary IV**

Name	Social Security #
Address	Date of Birth
	Relationship to Trust

**Beneficiary V**

Name	Social Security #
Address	Date of Birth
	Relationship to Trust

**Beneficiary VI**

Name	Social Security #
Address	Date of Birth
	Relationship to Trust

**Beneficiary VII**

Name	Social Security #
Address	Date of Birth
	Relationship to Trust