



Transfer on Death Account Designation

IMPORTANT INFORMATION:

If you are establishing a new Pacific Premier Trust Non-Qualified (Taxable) Account as a Transfer on Death (TOD) Account, this form must be accompanied by a completed and executed Pacific Premier Trust Non-Qualified (Taxable) Account Establishment form. TOD registration is NOT ALLOWED for accounts registered as tenants in common.

- Please note that this form cannot be used to update beneficiary information for retirement accounts.

You must complete and sign this form if:

- 1. You wish to establish a Pacific Premier Trust Non-Qualified (Taxable) Account as a TOD Account; or
2. You wish to convert your existing Pacific Premier Trust Non-Qualified (Taxable) Account to a TOD Account; or
3. You wish to cancel or change your beneficiary designation on an existing Pacific Premier Trust TOD Account.

1. ACCOUNTTYPE AND OWNER INFORMATION

- Please select the appropriate account type:

Individual Joint Trust
Estate Guardianship/Conservatorship Minor (UGMA/UTMA)

NAME (FIRST, MI, LAST)\*

EXISTING PACIFIC PREMIER ACCOUNT NO.\*

Must exactly match name(s) of individual or joint tenants with right of survivorship (JTWROS) on Non-Qualified (Taxable) Account Establishment form or existing account.

2. ACCOUNT ACTION

- I would like to:

Establish a Pacific Premier Trust Non-Qualified (Taxable) Account as a Transfer on Death ("TOD") Account.

Convert my existing Pacific Premier Trust Non-Qualified (Taxable) Account, Account No.: \_\_\_\_\_, to a TOD Account.

Cancel or change my beneficiary designation on an existing Pacific Premier Trust TOD Account.

3. TRANSFER ON DEATH BENEFICIARY DESIGNATION

The total percentage for each class of beneficiary (primary or contingent) must equal 100%. For example: if you are designating 3 beneficiaries with rights to equal portions of the account, the amount should reflect 33.33%, 33.33% and 33.34%. If your beneficiary designation in each class does not equal 100%, Pacific Premier Trust will not be able to process the designation and will out for clarification.

If you are designating a Trust as beneficiary - Pacific Premier Trust also requires a completed Trust Certification Form in order to process the designation.

In the event of your death, your account will be divided equally (unless otherwise indicated by you) to any living beneficiaries. If no primary beneficiary survives you, your account will be divided equally (unless otherwise indicated by you) to any living contingent beneficiaries. If you are not survived by any designated primary or contingent beneficiary, your account will become part of your estate (in the case of an individual account) or the estate of the last owner to die (in the case of a JTWROS account). If any of the multiple beneficiaries at a particular level (primary or contingent) dies before his or her interest is completed, the remaining interest shall be divided among the surviving beneficiaries according to the ratio of allocation between such surviving beneficiaries.

If you are using this form to change your beneficiary designation on an existing Pacific Premier Trust TOD Account, this designation voids your current beneficiary designation in its entirety. You must include all intended beneficiaries on this form (using additional sheets as necessary), including any that may have been named in an earlier designation, for any allocation to such beneficiary to be effective.

Important note about community property rights. If you live in a community property state and you are married, your spouse may have certain rights to your account. You may wish to consult with your legal advisor(s) for guidance on community property rights.



**PRIMARY BENEFICIARY(IES)**

Below, please provide us with your beneficiary information. These fields are needed to aid Pacific Premier Trust in reaching the named parties if required.

BENEFICIARY #1 NAME (FIRST, MI, LAST)*	DATE OF BIRTH*	PHONE NO.	PERCENTAGE* %
SOCIAL SECURITY NO.*		RELATIONSHIP*	
RESIDENCE ADDRESS*			
CITY*	STATE/PROVINCE*	COUNTY*	POSTAL CODE*
EMAIL ADDRESS			

BENEFICIARY #2 NAME (FIRST, MI, LAST)*	DATE OF BIRTH*	PHONE NO.	PERCENTAGE* %
SOCIAL SECURITY NO.*		RELATIONSHIP*	
RESIDENCE ADDRESS*			
CITY*	STATE/PROVINCE*	COUNTY*	POSTAL CODE*
EMAIL ADDRESS			

**CONTINGENT BENEFICIARIES**



BENEFICIARY #1 NAME (FIRST, MI, LAST)*	DATE OF BIRTH*	PHONE NO.	PERCENTAGE* %
SOCIAL SECURITY NO.*		RELATIONSHIP*	
RESIDENCE ADDRESS*			
CITY*	STATE/PROVINCE*	COUNTY*	POSTAL CODE*
EMAIL ADDRESS			

BENEFICIARY #2 NAME (FIRST, MI, LAST)*	DATE OF BIRTH*	PHONE NO.	PERCENTAGE* %
SOCIAL SECURITY NO.*		RELATIONSHIP*	
RESIDENCE ADDRESS*			
CITY*	STATE/PROVINCE*	COUNTY*	POSTAL CODE*
EMAIL ADDRESS.			



**4. ACKNOWLEDGMENT & SIGNATURE**

I, the undersigned, hereby acknowledge that I have read, understand, and agree to all of the terms of the Pacific Premier Trust Non-Qualified (Taxable) Account Establishment form, Instructions and Additional Terms and Conditions, and terms of this Transfer on Death Account Designation form for Pacific Premier Trust Non-Qualified (Taxable) Accounts (collectively the "TOD Account Documents") and that I have retained a copy of such documents for my own records. I authorize Pacific Premier Trust to process this beneficiary designation. I agree to release, indemnify, defend, and hold Pacific Premier Trust and its related entities harmless from any claims arising out of processing my beneficiary changes/updates including any damages, fees, costs or expenses arising therefrom.

	ACCOUNT OWNER SIGNATURE*	
	PRINT NAME*	DATE
	JOINT ACCOUNT OWNER SIGNATURE*	
	PRINT NAME*	DATE

Pacific Premier Trust performs the duties of an independent custodian of assets for self-directed individual and business retirement accounts and does not provide investment advice, sell investments or offer any tax or legal advice. Clients or potential clients are advised to perform their own due diligence in choosing any investment opportunity as well as selecting any professional to assist them with an investment opportunity.

**NON-DEPOSIT INVESTMENT PRODUCTS ARE NOT INSURED BY THE FDIC; ARE NOT DEPOSITS OR OTHER OBLIGATIONS OF, OR GUARANTEED BY, THE BANK OR ANY OF ITS DIVISIONS; AND ARE SUBJECT TO INVESTMENT RISKS, INCLUDING POSSIBLE LOSS OF THE PRINCIPAL AMOUNT INVESTED.**

Upload forms to:  
[PacificPremierTrust.com/upload](https://PacificPremierTrust.com/upload)  
Fax to: 303.614.7038

Send mail to:  
FIS-Processing Center  
Attn: Pacific Premier Trust  
P.O. BOX 981012  
Boston, MA 02298

For express deliveries:  
FIS-Remittance Processing  
Loading Dock #2  
Attn: Pacific Premier Trust  
10 Dan Road  
Canton, MA 02021

Questions?  
Call: 800.962.4238

