

INDIVIDUAL / JOINT INVESTMENT APPLICATION

New ApplicationChange of Information		or Office Use Only #	For Office U Investment #	•
1. Type of Account Registration				
☐ Individual ☐ Joint With Rights of S	Survivorship D C	Other:		
2. Owner Information (s) (Application	ant)			
Applicant Name:				
Address:			· · · · · · · · · · · · · · · · · · ·	
City:	State:		Zip:	
Home Phone				
Email:				
Marital Status: Single Married	■ Widow	Birth Date:		
3. Co-Owner Information (If Appli	cable) (Attach ad	lditional sheet for more	e co-owners)	
CoApplicant Name:_				
Address:				
City:			Zip:	
Home Phone	Work:		_ Cell:	
Email:				
Marital Status: ☐ Single ☐ Married	☐ Widow	Birth Date:		
C o - Applic Nortme				
C o - Applicantme:				
Address:				
Address:City:			Zip:	
City:	State:			
Address: City: Home Phone Email:	State: Work:		_ Cell:	
City:	State: Work:		_ Cell:	
City: Home Phone Email:	State: Work:		_ Cell: SS#	
City:	State: Work:		_ Cell: SS#	
City:	State: Work:		_ Cell: SS#	
City:	State: Work: Widow		_ Cell: SS#	
City:	State:Work:	Birth Date:	_ Cell: _ SS#	
City: Home Phone Email: Marital Status: Single Married 4. Church Affiliation Church Name: Church Name: Address:	State:Work:	Birth Date: n Death" (attach additional sl	_ Cell: _ SS#	
City: Home Phone Email: Marital Status: Single Married 4. Church Affiliation Church Name: Church Name: Church Address: 5. "Payable On Death" Designation I would like my/our account(s) designation	State: Work: Work: Widow (Beneficiaries) nated "Payable O	Birth Date: n Death" (attach additional sl	Cell:	
City: Home Phone Email: Marital Status: Single Married 4. Church Affiliation Church Name: Church Name: Church A ddress: 5. "Payable On Death" Designation I would like my/our account(s) designation	State: Work: Work: Widow (Beneficiaries) nated "Payable O	Birth Date: n Death" (attach additional sl	Cell:	Share

If one or more of the beneficiaries predeceases me, I would like their share to \square go to the estate or heirs of the deceased beneficiary or \square be equally shared among the remaining beneficiaries. If neither are checked, funds will be

made payable to the estate or heirs of the deceased beneficiary.