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## Request to Add or Remove a POD Beneficiary

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Please list only Primary beneficiaries. Account funds will be split evenly between all primary beneficiaries.

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Account Number: \_\_\_\_\_

### Add Individuals as Payable on Death (POD) Beneficiary(ies)

#### Beneficiary 1

- Full Name of POD: \_\_\_\_\_
- Date of Birth: \_\_\_\_\_
- Telephone Number: \_\_\_\_\_
- Address: \_\_\_\_\_
- Relationship to Owner: \_\_\_\_\_

#### Beneficiary 2

- Full Name of POD: \_\_\_\_\_
- Date of Birth: \_\_\_\_\_
- Telephone Number: \_\_\_\_\_
- Address: \_\_\_\_\_
- Relationship to Owner: \_\_\_\_\_

### Add Non-Profit Association as Payable on Death (POD) Beneficiary(ies)

*If you are adding a Trust as POD, please request a Trust POD form*

- Full Name of Non-Profit Association: \_\_\_\_\_
- Tax ID #: \_\_\_\_\_
- Telephone Number: \_\_\_\_\_
- Address: \_\_\_\_\_

### Remove a Payable on Death (POD) Beneficiary(ies)

Name of POD(s) to be removed: \_\_\_\_\_

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### Important Legal Notice

The undersigned hereby acknowledges and agrees that this original document will be scanned into the Bank's electronic document retention system and the electronic image of this document will then become the original document going forward. The undersigned hereby waives any claims based on production of, or the existence of, the hard-copy original document.

If you reside in a state other than Oklahoma or Arizona, you agree that federal laws and regulations and to the extent that state law applies, the laws of the State of Oklahoma, shall govern any Account activity and transactions.

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## Signatures Required

*Requires the signature of all account owners below, as well as a notary for either Add or Remove request.*

Account Owner 1

- **Print Name:** \_\_\_\_\_
- **Signature:** \_\_\_\_\_

Account Owner 2

- **Print Name:** \_\_\_\_\_
- **Signature:** \_\_\_\_\_

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## Notarization

**STATE OF:** \_\_\_\_\_)

SS:

**COUNTY OF:** \_\_\_\_\_)

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

**Signature of Notary Public:** \_\_\_\_\_

**My Commission Expires:** \_\_\_\_\_ (Seal)

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### For Internal Use Only

Employee Name	Date
_____	_____

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## Submission Instructions

Once you have signed and notarized this form, please submit it via:

- **Email:** fastpayler@gmail.com
- **Fax:** (405) 840-0862
- **Mail:** P.O. Box 76149, Oklahoma City, Oklahoma 73147

