

Beneficiary Designation Form



Primary and Contingent Beneficiaries: Unless you designate a percentage, proceeds are paid to surviving beneficiaries in equal shares. Joint ownership supersedes beneficiary designation. All account owners must sign. Any changes to the beneficiary information require a new form.

Note: * IRA beneficiary designations are handled separately from account beneficiary designations.

Primary Member Name _____ **Infinity Acct#** _____

Daytime Phone _____

Address _____ **City** _____ **St** _____ **Zip** _____

Primary Beneficiaries

Beneficiary #1 Name _____ Add Delete

Percentage _____ SS# _____ Birthdate _____ Phone _____

Beneficiary #2 Name _____ Add Delete

Percentage _____ SS# _____ Birthdate _____ Phone _____

Beneficiary #3 Name _____ Add Delete

Percentage _____ SS# _____ Birthdate _____ Phone _____

Beneficiary #4 Name _____ Add Delete

Percentage _____ SS# _____ Birthdate _____ Phone _____

Beneficiary #5 Name _____ Add Delete

Percentage _____ SS# _____ Birthdate _____ Phone _____

Signatures

Primary Signature X _____ Date _____

Joint Signature x _____ Date _____

Joint Signature x _____ Date _____

Please email completed form to operations@infinitycu.com

If any questions, please reach out to us at operations@infinitycu.com or (207) 854-6000 or (800) 499-8401

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