

Transfer on Death Agreement Form Update

Releasing 11.22.23

On November 22, 2023, we will be releasing our updated Transfer on Death Agreement form. Users will now be able to select the Per Stirpes option in addition to the Primary or Contingent beneficiary selection.



axos
ADVISOR SERVICES

Transfer on Death Agreement

This form is used to name a beneficiary for your non-retirement brokerage account. For an Individual Retirement Account (IRA), please use the IRA Change of Beneficiary Form. Please complete all information. You must designate at least one primary Beneficiary.

ACCOUNT INFORMATION - REQUIRED

Account Title (Name of this account)		Account Number		
Eligible Account Type: (select one)				
<input type="radio"/> Individual (Non-IRA) <input type="radio"/> JTWR0S <input type="radio"/> Tenants by Entirety <input type="radio"/> Community Property WR0S				
DESIGNATION OF BENEFICIARY				
Percentages must total 100% for all primary beneficiaries and 100% for all contingent beneficiaries. If primary or contingent is not marked, then the beneficiary will be deemed primary. If percentages are not indicated, then they will be deemed equal shares.				
Subject to the condition(s) set forth in this Agreement, I designate the following as the Beneficiary(ies) of my account:				
<input type="radio"/> PRIMARY	SHARE %	BENEFICIARY'S NAME	SOCIAL SECURITY NUMBER/TAX ID	DATE OF BIRTH
<input type="radio"/> CONTINGENT		RELATIONSHIP	ADDRESS	
<input checked="" type="checkbox"/> PER STIRPES				
<input type="radio"/> PRIMARY	SHARE %	BENEFICIARY'S NAME	SOCIAL SECURITY NUMBER/TAX ID	DATE OF BIRTH
<input type="radio"/> CONTINGENT		RELATIONSHIP	ADDRESS	
<input checked="" type="checkbox"/> PER STIRPES				
<input type="radio"/> PRIMARY	SHARE %	BENEFICIARY'S NAME	SOCIAL SECURITY NUMBER/TAX ID	DATE OF BIRTH
<input type="radio"/> CONTINGENT		RELATIONSHIP	ADDRESS	

If you have any questions, please contact your Client Services Advocate.

Investment Products: Not FDIC Insured - No Bank Guarantee - May Lose Value.

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