



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. ACCOUNT TYPE 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.



PRIMARY BENEFICIARY(IES)

Please provide us with your beneficiary information, below. These fields are needed to aid PPT 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. SPOUSAL CONSENT

- For use in community or marital property states. (As of this printing, the community property states are Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington and Wisconsin.)

This section, if applicable, must be signed and dated by the spouse of an individual Account Owner, as well as notarized, if:

1. The Account Owner is married and has designated any Primary Beneficiary other than his/her spouse; and
2. The Account Owner's TOD Account includes, or will include, property in which his/her spouse possesses a community property interest or other type of property interest.

I, the undersigned spouse of the Account Owner named above, hereby consent to, and accept, the beneficiary designation without regard to whether I survive or predecease my spouse.

	SPOUSE'S SIGNATURE*	DATE (REQUIRED)
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5. NOTARY PUBLIC

Acknowledgment only for spousal consent, if applicable.

NOTARY PUBLIC:



STATE OF*	COUNTY OF*	[SEAL]
The foregoing instrument was acknowledged before me this		
DAY OF THE WEEK*	DATE, MONTH AND YEAR*	

by

PRINT NOTARY NAME*

6. 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.

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

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
Fax to: 303-614-7038

Send mail to:
Pacific Premier Trust
Processing Center
PO 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

