

C.A.H.P. Credit Union Beneficiary Designation/Change Form

Please Print or Type

Member Name

Membership Number

Designation of Beneficiary *(Revocable; see below for complete instructions)*

Beneficiary(ies) - % Column MUST total 100%

%	Name	Mailing Address	Relationship	Birth Date	SSN

This beneficiary designation overrides all previous designations for this membership account. If you have more than one membership account, you must fill out a separate Beneficiary Designation/Change Form for each membership account.

Member/Owner's Signature

(This beneficiary designation is not effective unless signed)

X _____
Original Member/Owner's

Signature Date (mm/dd/yyyy)

General Instructions

A beneficiary can be a person, trust, charity, or your estate. Write only one beneficiary on each line. Make sure you write the full names of all beneficiaries. For example, if you name your children as beneficiaries, DO NOT merely write "children" on one of the lines; instead, write the full names of all your children on separate lines.

DO NOT name a "joint account" holder as a beneficiary. Account ownership automatically transfers to the joint owner(s) upon the death of the "primary account" holder/member.

Order of Payment

For "individual accounts," upon an account owner's death, the account will be payable to the beneficiary(ies) listed unless the beneficiary(ies) has(have) predeceased the account owner.

For "joint accounts," upon the death of all account holders, the account will be payable to the beneficiary(ies) listed unless the beneficiary(ies) has(have) predeceased the account owner.



Serving Those Who Serve Us

As a financial service company, C.A.H.P. Credit Union's success resides first and foremost in the quality and commitment of our staff and the service they provide. The Credit Union's dedication to member service has, and always will be, our highest priority and the key to continuing success. The credit union is unique because we do not have any plans to serve the general public. Our members appreciate having a common bond with other members and C.A.H.P. Credit Union will always be: *"The Quality Financial Service Choice for Public Safety Families."*

Membership in C.A.H.P. Credit Union means becoming part of a very special financial family. Brought together by the common bond of public safety, our members use their combined financial strength to benefit to benefit each other.

C.A.H.P. Credit Union is proud to serve:

- CAHP (California Association of Highway Patrolmen)
- California Exposition State Fair Police Department
- California Highway Patrol
- California Homicide Investigators' Association (CHIA)
- Department of Justice, Association of Special Agents
- Huron POA
- LASD Retired Association
- Latino POA
- Peninsula Fire District
- PORAC (Peace Officers Research Association of California)
- Riverside Sheriffs' Association
- Sacramento County Deputy Sheriffs' Association
- Sacramento Fire Local 522
- San Manuel Indian Nation, Department of Public Safety
- Union Pacific Police Department
- West Covina Police Department
- West Sacramento Police Department

We also serve the *family members* and *office staff* of all of the above groups! Because of our specific membership base, we have a wide range of products and services designed to meet the needs of public safety professionals throughout the state. *[If your work group does not fall under any of the above, please contact us to learn how you can start the process towards becoming part of our exceptional membership base.]*

Designating a beneficiary is an important step in managing your finances. And because C.A.H.P. Credit Union is dedicated to helping you realize your financial goals—setting up a budget, reducing your debt, saving for higher education, buying your first home, or planning for retirement, we now offer a fantastic benefit of membership: BALANCE Financial Fitness Program. Through BALANCE, you have access to free, unbiased money management information and assistance. All you have to do is make a toll-free phone call. To learn more visit our website (www.cahpcu.org) or call BALANCE directly at 888-456-2227. BALANCE staff are available Monday through Thursday, 5 am to 8 pm, Friday, 5 am to 5 pm, and Saturday, 8 am to 5 pm (PST).