Clear Form

Mainstar Trust | guide your future

CHANGE OF BENEFICIARY

Forward To: 214 West 9th Street
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Onaga, KS 66521-0420
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F) 913.901.4190
CustomerService@mainstartrust.com

Please Print or Type

ACCOUNT HOLDER INFORMATION		
ACCOUNT HOLDER NAME	ACCOUNT NUMBER	
ADDRESS	SOCIAL SECURITY NUMBER	DATE OF BIRTH
	HOME PHONE	BUSINESS PHONE

I designate that upon my death, the assets in this account be paid to the beneficiary(ies) named below. The interest of any beneficiary who predeceases me terminates completely, and the percentage share of any remaining beneficiaries will be increased on a pro rata basis unless you indicate a Per Stirpes beneficiary designation. Mainstar Trust will rely on instruction from the executor of your estate regarding the identity of the heirs per stirpes. If neither primary nor contingent is indicated, the beneficiaries will be deemed to be a primary beneficiary. If more than one primary beneficiary is designated and no distribution percentages are indicated, the beneficiaries will be deemed to own equal share percentages in the Account.
If no primary beneficiary(ies) survives me, the contingent beneficiary(ies) shall acquire the designated share of my Account. Multiple contingent beneficiaries with no share percentage indicated will also be deemed to share equally.

If you are designating a Trust as Primary or Contingent beneficiary, the first, last, and signature page of the Trust are required. Upon the Trust becoming owner of the account, the fully executed Trust documents will be required to process a death claim.

	Name and Address	Date of Birth	Social Security Number	Relationship	Primary or Contingent	Share %
1.						
2.						
3.						
4.						

SPOUSAL CONSENT

This section should be reviewed if the account holder is married and does not name their spouse as sole beneficiary. This applies to ***all states****, not just the community or marital property states. Due to the important tax consequences of giving up one's property interest, individuals signing this section should consult with a competent tax or legal advisor.*

Current Marital Status

☐ **I am not Married** - I understand that if I become married in the future, I should review a new Change of Beneficiary form.

☐ **I am Married** - I understand that if I choose to designate a primary beneficiary other than my spouse, my spouse must sign below.

I am the spouse of the above-named account holder. I acknowledge that I have received a fair and reasonable disclosure of my spouse's property and financial obligations. Due to the important tax consequences of giving up my interest in this account, I have been advised to see a tax professional.

I hereby give the account holder any interest I have in the funds or property deposited in this account and consent to the beneficiary designation(s) indicated above. I assume full responsibility for any adverse consequences that may result. No tax or legal advice was given to me by the Custodian.

Signature of Spouse Date Signature of Witness Date

SIGNATURES

Important: Please read before signing.

I understand that I may change beneficiaries at any time by completing and delivering the proper form to the Custodian. The Custodian has provided no tax or legal advice to me regarding my beneficiary designations.

Signature of Account Holder Date Signature of Witness Date