

# CUSTODIAN / POWER OF ATTORNEY

Print the custodian's information on this form. Enter the primary member's information on the main application.

For custodian accounts, **the beneficiary, minor, or principal is the PRIMARY MEMBER.** All parties must sign and date the main application. Deposits to an UTMA/UGMA (Uniform Transfers/Uniform Gifts To Minors) custodian account are irrevocable. The funds belong to the minor, but are controlled by the custodian until the minor reaches at least 18 years of age.

Specify Type of Custodian Account (Guardian, POA, UTMA/UGMA, etc.):

Expiration date of POA, if applicable:

\_\_\_\_\_

\_\_\_\_\_ / \_\_\_\_\_ /20 \_\_\_\_\_

Name of Custodian: \_\_\_\_\_  
(First) (Middle) (Last)

SSN/ITIN: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Relationship to Member: \_\_\_\_\_

Street Address: \_\_\_\_\_ Home Phone: ( ) - \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP Code: \_\_\_\_\_ Work Phone: ( ) - \_\_\_\_\_

Primary Member's Name: \_\_\_\_\_