

ufb DIRECT

CHANGE REQUEST: UNIFORM TRANSFERS TO MINORS

Complete the following with your current personal information and indicate the account(s) requesting to be changed.

Customer Name:	Account Number(s):
-----------------------	---------------------------

By signing below I certify that I have provided true and accurate information.

Signature and Date

Complete this form and return it with this page by one of the following methods:

Secure Email: Login to Online Banking, click on Contact Us, and send a secure email with a scanned copy of the signed documents.

Fax to: 1-858-350-0443

Mail to:

Deposit Operations: New Accounts

P.O. Box 509127

San Diego, CA 92150-9948

ufb DIRECT

Uniform Transfer to Minors Act

Accounts in an UTMA belong to the minor and the minor social security number is used for reporting purposes. A successor custodian may be appointed by naming such person as successor below; would become effective upon the death of the custodian and the minor is not of legal age. It is the responsibility of the Custodian to make account arrangements when the minor attains the age of 18 or otherwise specified.

_____ as Custodian for _____

until age _____ under the California Transfers to Minors Act.

Name of Minor:	Social Security Number:
Date of Birth:	Physical Address:

Custodian Signature and date

Optional:

Successor Custodian:	Social Security Number:
Date of Birth:	Physical Address:
Email:	Home Phone:

Successor Custodian Signature and date