



Certificate Number: _____

Date of Request: _____

Current Name(s) on Certificate:

First Middle Last First Middle Last

Circumstances of Transfer Request (initial one):

_____ Due to the death of a member.

If so, please attach the following:

1. Death Certificate, in addition to both of the following scenarios:
2. If the Certificate IS part of an estate:
 - a. Attach a Letter of Administration issued within 30 days of the transfer request;
 - b. Have the Personal Representative sign the back of the original Certificate stating the name of the person to whom the Certificate is being transferred (please note that no Certificate can be in the name of more than two person(s));
 - c. Have the surviving Certificate Holder also sign the back acknowledging the transfer;
 - d. Please be certain to have the signatures guaranteed by the seal of a bank medallion and not a Notary Public. You can obtain this at a bank and would be simplest to go to a bank where you have your own account, or one that is familiar with you. You will need to bring at least one form of identification with you, but check with the bank first, as each bank has separate policies on that matter.
3. If the Certificate is NOT part of an estate:
 - a. Have the surviving Certificate Holder sign the back of the original Certificate stating the name of the person whom the Certificate is being transferred (please note that no Certificate can be in the name of more than two person(s));
 - b. Please be certain to have the signatures guaranteed by the seal of a bank medallion and not a Notary Public. You can obtain this at a bank and would be simplest to go to a bank where you have your own account, or one that is familiar with you. You will need to bring at least one form of identification with you, but check with the bank first, as each bank has separate policies on that matter.

_____ Due to a non-death related transfer (sale, gift, estate planning, etc.)

1. Have all Certificate Holder(s) sign the back of the original Certificate stating the name of the person(s) to whom the Certificate is being transferred (please note that no Certificate can be in the name of more than two person(s));
2. Please be certain to have the signatures guaranteed by the seal of a bank medallion and not a Notary Public. You can obtain this at a bank and would be simplest to go to a bank where you have your own account, or one that is familiar with you. You will need to bring at least one form of identification with you, but check with the bank first, as each bank has separate policies on that matter.

Name(s) of person(s) transferring to:

First Person Listed:

First Middle Last

Street Address

City State Zip

Phone Number Email

Spouse Name:

First Middle Last

Street Address

City State Zip

Phone Number Email

Minor Children:

First Middle Last

Date of Birth

First Middle Last

Date of Birth

Second Person Listed:

First Middle Last

Street Address

City State Zip

Phone Number Email

Spouse Name:

First Middle Last

Street Address

City State Zip

Phone Number Email

Minor Children:

First Middle Last

Date of Birth

First Middle Last

Date of Birth

