



2013 Church Family Ownership Program

CHURCH FAMILY OWNERSHIP DESIGNATION OF BENEFICIARY

Name(s) of CFO Lender/Investor	Social Security Number(s)	CFO Note Acct No— office use only
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If more than one name is entered—**joint account owners**—check here to direct that this account be held JOINTLY WITH RIGHT OF SURVIVORSHIP. Checking this option will make all beneficiaries listed below *contingent beneficiaries*.

My **primary and/or contingent beneficiary(ies) are shown below**. If neither primary nor contingent is indicated, they shall be deemed a primary beneficiary. Multiple primary beneficiaries with no share percentage will be deemed to share equally in CFO Promissory Note. Multiple contingent beneficiaries with no share percentage indicated will also be deemed to share equally. The interest of any beneficiary who dies before me shall terminate completely, and the percentage share of any remaining beneficiary(ies) shall be increased on a pro rata basis. If no primary beneficiary(ies) survives me, the contingent beneficiary(ies) shall acquire the designated share of my CFO Promissory Note.

<input type="checkbox"/> Primary <input type="checkbox"/> Contingent	Name	Social Security #	
	Address	Date of Birth	Share %
Relationship			

<input type="checkbox"/> Primary <input type="checkbox"/> Contingent	Name	Social Security #	
	Address	Date of Birth	Share %
Relationship			

<input type="checkbox"/> Primary <input type="checkbox"/> Contingent	Name	Social Security #	
	Address	Date of Birth	Share %
Relationship			

<input type="checkbox"/> Primary	Name & Date of Trust*:
<input type="checkbox"/> Contingent	*If a trust is designated, a copy of the title, trustee, and signature pages of the trust must accompany this form.

SPOUSAL CONSENT (MARRIED ACCOUNTHOLDER WITH PRIMARY BENEFICIARY OTHER THAN SPOUSE)

CURRENT MARITAL STATUS

- I am Not Married. I understand that if I become married in the future, I must complete a new CFO Promissory Note Designation 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 CFO Promissory Note account holder named above. I agree to my Spouse naming a Primary Beneficiary other than myself. I acknowledge that I have received a fair and reasonable disclosure of my Spouse's property and financial obligations. I have been advised to see a tax professional and no tax or legal advice was given to me by Unity Church of Wimberley. I acknowledge that I shall have no claim whatsoever against Unity Church of Wimberley, for any payment to my Spouse's named Beneficiary(ies).

Spouse's Signature:	Date:
Spouse's Printed Name:	

SIGNATURES

I hereby revoke any and all prior designations of beneficiary, and understand that I may revoke or change this beneficiary designation at any time by submitting a new Designation of Beneficiary form to the Unity Church of Wimberley Business Office. I understand that if I am married and elect to designate a beneficiary other than my spouse, I should consult with my legal advisor as to any interest (community property, marital property, or otherwise) my spouse has or may have with respect to this CFO Promissory Note and the effect of any such interest on this beneficiary designation. A Beneficiary Designation shall be valid only if dates and signed by me and filed with Unity Church of Wimberley before my death.

Account Holder Signature(s):	Date:
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Accepted by Unity Church of Wimberley Authorized Signer for Unity Church of Wimberley:	Date:
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