



JOINT MEMBERSHIP OPTIONS FOR DECEASED MEMBERS

ESTATE OF: _____ MEMBER#: _____

Thank you for notifying MTA of a deceased member, we are sorry for your loss. As MTA is a not for profit, member-owned cooperative, capital credits have accrued for each year of service obtained from MTA. MTA Bylaws allow for early retirement of capital credits upon the death of one of its members.

Please note that the disbursement amount of the capital credits will be reduced to reflect the early retirement.

As a joint member you have three options:

- ___1. Leave the member name as is and wait for the regular disbursement of capital credits. Payee on checks will have both names.
- ___2. Request the removal of the deceased spouse's name from the member record and allow regular disbursement with checks being written in your name alone. Please provide a copy of the death certificate and a note requesting their name removed for this option.
- ___3. Request early retirement of capital credits at a discounted rate. To make this request, please complete the forms enclosed as directed below.

Please find the attached *Capital Credit Affidavit* for the above reference member account. Along with the completed affidavit, please return a copy of the death certificate and IRS W-9 Form to the address below. Once these documents are received, capital credits will be retired and issued in the name of the estate.

If you have any questions, please call (907) 761-2661. For faster service, you can email documents to capitalcredits@mta-telco.com or fax (907) 761-2651.

Kind Regards,

MTA Capital Credits Team

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