

# ORDER FOR SERIES EE OR I U.S. SAVINGS BONDS

PLEASE FOLLOW THE INSTRUCTIONS ON THE BACK. PRINT IN CAPITAL LETTERS. SCANNABLE FORM – DO NOT WRITE OUTSIDE BOXES.

**1. FULL NAME OF OWNER OR FIRST-NAMED COOWNER**

**Name**

**Social Security Number**            -            -

**2. NAME OF PERSON TO RECEIVE BONDS IF OTHER THAN OWNER OR FIRST-NAMED COOWNER ABOVE**

**Mail to:**

**3. ADDRESS WHERE BONDS ARE TO BE MAILED**

(NUMBER AND STREET, RURAL ROUTE, OR POST OFFICE BOX)

(CITY OR TOWN)

(STATE)

(ZIP CODE)

**4. COOWNER OR BENEFICIARY (Optional) The following person is to be named as**  **co-owner**  **beneficiary:**

**Name**

(Co-ownership will be assumed if neither or both blocks are checked.)

**5. BONDS ORDERED**

Denom.	EE Bonds		I Bonds		Total Issue Price
	Quantity	Issue Price	Quantity	Issue Price	
\$50		\$25.00		\$50.00	
\$75		\$37.50		\$75.00	
\$100		\$50.00		\$100.00	
\$200		\$100.00		\$200.00	
\$500		\$250.00		\$500.00	
\$1,000		\$500.00		\$1,000.00	
\$5,000		\$2,500.00		\$5,000.00	
\$10,000		\$5,000.00		\$10,000.00	
<b>Total issue price of purchase:</b>					

**6. DATE PURCHASE ORDER AND PAYMENT PRESENTED TO AGENT**

(MO.)

(DAY)

(YR.)

**7. SIGNATURE**

IF YOU NEED A GIFT CERTIFICATE, PLEASE  
 ASK THE PERSON ACCEPTING THIS FORM TO  
 PROVIDE ONE TO YOU.

PURCHASER'S SIGNATURE

\_\_\_\_\_  
 PURCHASER'S NAME, IF OTHER THAN OWNER OR FIRST-NAMED COOWNER (Please print)

( )

\_\_\_\_\_  
 DAYTIME TELEPHONE NUMBER

STREET ADDRESS (If not shown above)

CITY

STATE

ZIP CODE

Account Number \_\_\_\_\_ Account Type \_\_\_\_\_

## Instructions for Completing the Purchase Order

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### 1. BUYER INFORMATION

Enter your full name and social security number.

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### 2. REGISTRATION INFORMATION

Type the full name of the owner or first-named co-owner. If this is a gift bond purchase, use the owner's name and social security number (if available). If the owner's social security number is unavailable, use the purchaser's social security number. Generally, only residents of the United States, its territories, and possessions may be named on Series EE savings bonds. Bonds may be registered as follows:

- a. Individuals in their own right – The bonds may be issued in the names of individuals (whether adults or minors) in single ownership, co-ownership, or beneficiary (POD) forms of registration.
- b. Others – Bonds are also available in other forms of registration. Trust forms of registration must be submitted on Form PD F 5263 (Series EE) or Form PD F 5374 (Series I).

**NOTE:** If you wish to name a co-owner or beneficiary on the bonds, make the appropriate selection to indicate the form of registration desired and type the person's name.

**If you name a co-owner:** The bonds may be cashed by either co-owner.

**If you name a beneficiary:** The bonds may not be cashed by the beneficiary during the lifetime of the owner. The name of a beneficiary can be eliminated without the beneficiary's consent.

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### 3. ADDRESS WHERE BONDS ARE TO BE DELIVERED

After "Mail to:" print the name to whom the bonds are to be delivered if different from the owner or first-named co-owner shown in item 2.

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### 4. BOND ORDER

Indicate next to the appropriate denomination the number of bonds you wish to purchase. The total price for each denomination (number of bonds multiplied by the issue price) and the total amount of the purchase will be calculated automatically.

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## SERIES EE BONDS

Series EE savings bonds are sold at one-half face value (a \$100 bond costs \$50). The Series EE savings bond is a security that accrues interest (that is, increases in value) until it is cashed or reaches final maturity in 30 years. (The "double E" is the successor to the Series E bond (also an accrual bond) that was issued from May 1941 through June 1980.) Series EE Bonds earn interest and grow in value as follow: Series EE savings bonds bought on or after May 1, 1997 will earn interest based on five-year Treasury security yields right from the start. The new rate

for EE bonds will be 90% of the average yields on 5-year Treasury securities for preceding six months. EE bonds increase in value every month, and interest is compounded semiannually.

For additional information about Series EE savings bonds, visit [www.savingsbonds.gov](http://www.savingsbonds.gov).

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## **SERIES I BONDS**

Series I savings bonds are sold at face value (a \$100 bond costs \$100) and grow with inflation-indexed earnings for up to 30 years. Like Series EE savings bonds, Series I savings bonds are U.S. Treasury securities backed by the full faith and credit of the United States Government. I Bonds will usually increase in value every month, and interest is compounded semiannually. The I Bond earnings rate is set by a combination of two separate rates: a fixed rate of return and a semiannual inflation rate. Each May and November Treasury announces a fixed rate of return and a semiannual inflation rate. Each May and November Treasury announces a fixed rate of return that applies to all I Bonds issued for the next six months. Also, every May and November Treasury determines a semiannual inflation rate based on changes in the Consumer Price Index for all Urban consumers (CPI-U). The semiannual inflation rate is then combined with the fixed rate of an I Bond to determine the bond's earnings rate for the next six months.

For additional information about Series I savings bonds, visit [www.savingsbonds.gov](http://www.savingsbonds.gov).

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## **5. AUTHORIZATION**

Sign and date the application.

Deliver to:	<b>Address:</b>	Chevron Federal Credit Union ATTN: Member Services P.O. Box 2069 Oakland, CA 94604-2069
	<b>Phone:</b>	800-232-8101
	<b>Fax:</b>	510-627-5233