

Member Trust Account Checklist

- Address on Identification matches current address
 - If No: Address verification document will be required. i.e phone bill, credit card bill, utility bill.
- Trust Documents
 - All documents are required with the exception of the exhibits
 - Trust Documentation must be signed by the Grantor

Revocable Trusts

- Social Security Number or TIN Certification from the Internal Revenue Service

Irrevocable Trusts

- TIN Certification from the Internal Revenue Service

Testamentary Trust

- Probate Court Documentation
- Death Certificate
- Will