

Name of Trust: _____

SSN/ITIN or Tax Identification No. (TIN): _____ Date Trust Established: _____

Trustees

1. Name (First, MI, Last): _____

Date of Birth (MM/DD/YYYY): _____ Full SSN/ITIN: _____ ☐ Check if ITIN

Physical Address: _____

Occupation: _____ Employer/Business Name: _____

☒ Signature of Trustee _____

2. Name (First, MI, Last): _____

Date of Birth (MM/DD/YYYY): _____ Full SSN/ITIN: _____ ☐ Check if ITIN

Physical Address: _____

Occupation: _____ Employer/Business Name: _____

☒ Signature of Trustee _____

3. Name (First, MI, Last): _____

Date of Birth (MM/DD/YYYY): _____ Full SSN/ITIN: _____ ☐ Check if ITIN

Physical Address: _____

Occupation: _____ Employer/Business Name: _____

☒ Signature of Trustee _____**Grantors, Successor Trustees or Beneficiaries**Grantors: 1. Name (First, MI, Last): _____ SSN/ITIN: _____ ☐ Check if ITIN

Physical Address: _____ Date of Birth: _____

2. Name (First, MI, Last): _____ SSN/ITIN: _____ ☐ Check if ITIN

Physical Address: _____ Date of Birth: _____

Successor Trustees: 1. Name (First, MI, Last): _____ SSN/ITIN: _____ ☐ Check if ITIN

Physical Address: _____ Date of Birth: _____

2. Name (First, MI, Last): _____ SSN/ITIN: _____ ☐ Check if ITIN

Physical Address: _____ Date of Birth: _____

Beneficiaries: 1. Name (First, MI, Last): _____ SSN/ITIN: _____ ☐ Check if ITIN

Physical Address: _____ Date of Birth: _____

2. Name (First, MI, Last): _____ SSN/ITIN: _____ ☐ Check if ITIN

Physical Address: _____ Date of Birth: _____

*Beneficiaries are requested for proper determination of NCUA insurance. If beneficiaries are not provided, your accounts will be insured as an individual or joint account.

I certify the above information is consistent with the terms and conditions of the above-named Trust dated: _____

☒_____
Grantor Signature or Trustee Signature if Grantor is Deceased_____
Date