

At the bank

Bring this sheet with you.

☐ Your photo ID ☐ Your Certification of Trust ☐ Your account numbers

Write these down before you go

The name of my trust _____

The date of my trust _____

Way 1. Say this

Say

“Please change this account into the name of my trust.”

Way 2. Say this

Say

“I want to name my living trust as the payable-on-death beneficiary on my account. Do you have a form for that?”

At an investment company, say transfer-on-death instead.

Name only your trust. Do not add other people. Ask for a copy of the finished form. **They do not offer it?** Then use Way 1 for that account.

Way 1. If they ask

What is the name of the trust?	Copy it from your Certification of Trust, word for word.
What is the date of the trust?	The day you signed it. It is on your Certification of Trust.
Who are the trustees?	You. If you share the trust with your spouse, both of you.
Can the trust be changed? Is it revocable?	Yes. It is a revocable living trust.
What is the tax number, or EIN?	The number written on your Certification of Trust. For most people that is a Social Security number.
Can we see the trust?	Hand them your Certification of Trust. It should be enough. Some banks will still ask to see a few pages, like the page that names the trustee.

The bank wants the whole trust, or says no? You have three choices. You can show them the whole trust. You can leave that account as it is and use Way 2. Or you can move the money to a bank that will do it.

Way 1. Before you leave, ask

Ask

“Will anything change with my checks, my card, my direct deposit, or my automatic bills?”

Ask for a paper that shows **the new name**. Keep it with your trust papers.