









\_\_\_\_\_  
Name of Trustee (first, middle initial, last)

➤ \_\_\_\_\_  
Signature of Trustee

\_\_\_\_ - \_\_\_\_ - \_\_\_\_  
Date (month, day, year)

**Notarization/Affidavit of Trustee**

*(Your signature must be notarized. We can't accept a signature guarantee in place of a notary's seal.)*

STATE OF \_\_\_\_\_ )

) ss.:

COUNTY OF \_\_\_\_\_ ) (if applicable)

This document was acknowledged before me on \_\_\_\_\_ (date) by \_\_\_\_\_ (name of trustee).

➤ \_\_\_\_\_  
Signature of Notary Public

\_\_\_\_ - \_\_\_\_ - \_\_\_\_  
Date (month, day, year)

\_\_\_\_\_  
Notary Public's Name (first, middle initial, last)

My commission expires:

\_\_\_\_ - \_\_\_\_ - \_\_\_\_  
Date (month, day, year)

**Notary to Place Seal Here**

**Reminders**

**If you're setting up a new trust Account:**

- **Attach this form** to the Enrollment Form when selecting a trust registration.
- **Include copies of the first and last pages of the trust agreement** that contain the name and date of the trust, as well as the names and signatures of the trustees.

**If a trustee is:**

- **Incapacitated.** Attach a certified copy of the court order of guardianship or conservatorship of the trustee.
- **Deceased.** Attach a certified copy of the death certificate. If the deceased trustee's Social Security number is the tax ID number for the trust Account, you must also update the trust tax ID number.
- **Resigning or being removed.** Attach a signed letter of resignation, a certified board resolution, certificate of incumbency, or other documentary evidence of the removal of the trustee.
- **A corporation or other business entity.** Attach an Organization Resolution Form dated within the last 60 days.

Allow two weeks for this Trustee Certification to be processed and for the trustees to receive confirmation of this request by mail.

**DO NOT STAPLE**