

PO Box 2226 ■ Omaha, NE 68103-2226
Fax: 800-914-8979

1. TRUST INFORMATION

Account Number:

In consideration of your opening or updating one or more accounts for the Trust named below, we, the undersigned Trustees, certify as follows:

The trust to which this certificate applies (example: *John Jones and Sam Smith, Trustees for the benefit of Mary Jones*):

Date of Formation of the Trust:
(MM-DD-YYYY)

Date of Last Amendment to the Trust:
(MM-DD-YYYY)

Name(s) of the Successor Trustee(s):
(if applicable)

Grantor(s) of the Trust:

Tax Identification Number for Trust:

The Beneficiaries of the Trust are:

Name of Beneficiary:

Name of Beneficiary:

Name of Beneficiary:

Name of Beneficiary:

2. TRUSTEES (All active trustees must complete.)

Unless checked, there are no trustees of the trust other than the undersigned.

Print Legal Name:

X Signature:

Date:

Print Legal Name:

X Signature:

Date:

Print Legal Name:

X Signature:

Date:

Print Legal Name:

X Signature:

Date:

Investment Products: Not FDIC Insured * No Bank Guarantee * May Lose Value

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