

## Other Accounts - Suggested Items

### Individual Retirement Account (IRA)

- Current statement, if transferring from another Financial Institution
- Beneficiary information, if applicable

### Power of Attorney

- Power of Attorney paperwork in its entirety

### Trust

- Certificate of Trust Existence & Authority

**Note:** *If death scenario*, we will also need the deceased grantor's original death certificate and Tax ID verification for the Trust (IRS Letter)

### Conservatorship

- Letters of Conservatorship
- Social Security Number and Date of Birth of protected Individuals

### FBO Account

- Letters from Organization requesting FBO Account (example: Social Security Administration)
- Social Security Number and Date of Birth of protected Individuals