REQUIRED DOCUMENTS FOR SII CONFIRMATION

Reason for Successor in Interest: **2. Transfer upon the death of a relative**

Required Application Documents for All Successors in Interest

1. **Completed Cover Sheet**
2. **Notarized Applicant Identification Form**
3. **Documents below specific to the Reason for Successor in Interest.** **See Below**

Specific Successor in Interest Documentation

4. **Certified copy of the death certificate,**

5. **Document confirming the applicant is a relative of the deceased (e.g. copy of birth certificate or marriage license, and ONE of the following**

5a. A copy of Letters of Administration or Letters Testamentary and either a copy of the will (if it isn't in the Letters Testamentary or an affidavit confirming the Applicant as an heir or beneficiary of the deceased customer.

5b. A court order or other judicial determination of heir showing the title going to the Applicant.

5c. A copy of the Trust Agreement or Trust Certification signed by the trustee, showing the Applicant as a beneficiary.

5d. If available, a copy of the most recently executed deed conveying title to the Applicant.