

Required Documents for Successor in Interest (SII) Confirmation

Reason for Successor in Interest:

5. Transfer to a living trust

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. Trust Agreement or Trust Certification signed by trustee**

- 5. If the customer is not a trustee, certification in writing that there has been no change to the customer's rights of occupancy in the property as a result of the transfer into the trust**