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General Account Management Forms

Affidavit of Domicile

Shows the residence of decedent at time of death. Affidavit of Domicile may be required when transferring the ownership of a security from a deceased person's name.

Beneficiary Unclaimed Check Reissue Request

Request to reissue uncashed checks for beneficiaries related to the decedent's account. Beneficiaries can use this form to claim outstanding funds that were previously issued as checks but have not yet been cashed.

Certificate of Trust Form

Substitute for presenting the entire trust agreement, as permitted by the relevant state law for the specified trust. A trust excerpt showing the name of the Trust, trustee signatures, and any relevant trust excerpts and amendments that identify the trustee(s), successor trustee(s), or Attorney-in-Fact is still required.

Change of Registration Authorization Form

Change your account registration or transfer the title of one or more accounts into the name of a new owner.

- Transfer Ownership Instructions
- Transfer Ownership of an Individual Account — Owner Deceased Instructions
- Transfer Ownership of a Joint Account with Rights of Survivorship Instructions

Checkwriting Privilege Form

Use this form to:

- Update signatures for existing checkwriting services.
- Add checkwriting services to an existing account.

Foreign Wire Redemption Supplement

- This form must be submitted along with your completed Redemption Authorization Form or IRA Distribution Request Form.
- To obtain the necessary information, please contact your local Bank representative.

Letter of Instruction

Utilize this document for specific account-related requests.

Multi-Purpose Certification Form

Permits specific individuals to transact on accounts registered to a corporation, trust, partnership, estate or other entity.

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Power of Attorney Appointment and Indemnification Agreement

Give an individual the ability to make transactions on your account on your behalf.

Redemption Authorization Form

Request a redemption from your non-retirement account.

Summary Statement Request Form

Shareholders can use this form to request copies of year-end summary statements for your account.

Unclaimed Check Reissue Request Form

Shareholders can use this form to claim outstanding funds that were previously issued as checks but have not yet been cashed.