

Miscellaneous Trust:

A Miscellaneous Trust is any type of trust that is not a Living Trust (e.g., Testamentary Trust, Special Needs Trust, Marital Trust, Spendthrift Trust, etc.).

All of the following are needed to open a Miscellaneous Trust account:

1. Copy of the Trust Agreement;

AND

2. EIN for the Trust (except special needs trusts can use the beneficiary's SSN)

If on hand, upload to the MRM session. If not, update the member's email and give the member the portal link to upload:

<https://www.numericacu.com/dec/eprocessing>

