

Testamentary Trust

A Testamentary Trust is a trust that is generally created in a person's will and will typically be named something along the lines of "John Doe Testamentary Trust"

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

1. Copy of the Trust Agreement (if the Trust is created from a will, a copy of the will is acceptable)

AND

2. EIN for the Trust

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>

