



Important: If you do not supply the proper beneficial ownership information immediately as requested below, you may risk delayed access to the accounts or denial of full insurance coverage for the beneficial owner and/or beneficiary.

What you need to know

In the case of bank failure, account trustees, or fiduciary account holders, are responsible for providing information regarding the owners and beneficiaries of the account. This information is used to determine the appropriate amount of FDIC (Federal Deposit Insurance Corporation) coverage and payment to the account holder(s) and beneficiaries.

What you need to do

As trustee for this account, you will need to provide the information listed below, along with any additional information requested, immediately. **Please note: If you do not supply the proper beneficial ownership information immediately, you may risk delayed access to the accounts or denial of full insurance coverage for the beneficial owner and/or beneficiary.**

Please call us at 800-972-3030 and have the following information ready:

- Type of trust - revocable or irrevocable
- Grantor's information - e.g., address and Social Security number
- Trust Tax Identification Number (TIN), if applicable
- Number of beneficiaries
- Name of each beneficiary and corresponding information, e.g., address and Social Security number

By submitting this information, you are certifying, to the best of your knowledge, that the information is accurate.

Where to find additional information

You can find more information on *Recordkeeping for Timely Deposit Insurance Determination* under Rule 12 CFR 370 at fdic.gov/deposit/deposits/brokers/part-370-appendix.html.

Please submit any questions to us at FDICHelp@53.com.

Thank you.