Bank Meeting:

Script:

Call your bank or institution (to make an appointment with a MANAGER) and say: "I have a revocable living trust and I want to:

change the beneficiary to the Trust, or

retitle my account into the Trust.

What do I need to do to transfer or update this account into my trust?"

Preparing for Your Bank Appointment

- Before visiting the bank, it is important to **schedule an appointment with a manager or a staff member who is knowledgeable about trusts**.
- You can do this either by calling the bank directly or by using the bank's online appointment system.
- Ask the banker what additional documentation or information they require (prior to your appointment.)

What to Bring to the Bank

- When you go to your appointment, make sure to bring your entire binder containing all trust documents. The banker may request to see your certificate of trust, and they might need to make copies of certain pages, such as the signature page or the successor trustee page.
- Be prepared to allow them to copy any necessary parts of your documentation.

Key Points for Discussion with the Banker

- During your meeting, clearly state that you have a "**revocable living trust**."
- Let the banker know your intention, whether it is to:
  - retitle an account or to
  - change the beneficiary,
- If the banker requests the trust's tax ID number, provide your Social Security number, as this serves as the tax ID for a revocable living trust.

Law Offices of Andrea L. Jakob, PA • 12401 Orange Drive Suite 219 • Davie, FL 33330 • 954-862-1479 • info@jakoblegal.com • http://www.jakoblegal.com