








TRUST ACCOUNTS SUMMARY


Online Banks	Support for Revocable Trusts?	Ability to Designate Trusts as a POD Beneficiary?	How to Title an Account in the Name of a Trust	How to Designate Trusts as a POD	Contact #
	✓	✓	Fill out the Max Common Application in the name of the Trustee	Submit UFB's "Change Request: Beneficiary" form	1-877-472-9200
	✓		Open an account in the name of the settlor and/or grantor (creator) of the Trust	N/A	1-800-446-6307
	✓	✓	Follow the steps on the Ally Bank website to apply as a Trust	Call Ally	1-877-247-2559
		✓	N/A	Log onto Account, click 'Beneficiaries and Owners' and add Trust as a POD	1-888-710-8756
		✓	N/A	Call Radius Bank Customer Support	1-800-242-0272

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TRUST ACCOUNTS

Online Bank	Support for Trusts?	How Online Bank Handles Trust Accounts
	<p>Yes</p> <p>Account can be Titled as a Revocable or Irrevocable Trust</p> <p>-</p> <p>Trust Can be Named as Payable On Death (POD) Beneficiary</p>	<p>To title a UFB account in the name of a trust:</p> <p>Step 1: Use the Max Common Application to apply for a new account in the name of the trustee (if there is more than one trustee, you can apply for an individual or joint account)</p> <p>Step 2: Submit a Certification of Trust form. You may access this form via the UFB Direct website:</p> <p>https://www.ufbdirect.com/Portals/UFB/Documents/Compliance/certification-oftrust.pdf</p> <p>By Email: newaccounts@axosbank.com</p> <p>By Fax: 1(858) 350-0443</p> <p>By Mail:</p> <p>Deposit Operations P.O. Box 509127 San Diego, CA 92150-9948</p>


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Online Bank	Support for Trusts?	How Online Bank Handles Trust Accounts
	<p>Yes</p> <p>Account must first be opened as a joint or individual Account. After the Account is opened, the primary (first named) Account owner may re-title the Account as a Revocable Living Trust Account</p>	<p>A Personal Savings Account must first be opened as a joint or individual Account. The primary Account owner must be a settlor and/or grantor (creator) of the Trust. After the Account is opened, the primary (first named) Account owner may then follow the steps below to re-title the Account as a Revocable Living Trust Account.</p> <ol style="list-style-type: none">1) Log in to your Account and click on 'My Profile' tab and choose the 'Living Trust Re-titling' option.2) You will be required to answer eligibility questions about the type of trust and the rights of the settlor/grantors (creators) and Trustees of the Revocable Living Trust.3) If the primary Account owner meets and electronically accepts all Account re-titling terms and conditions, the title of the Account may be changed to the name of your Revocable Living Trust. <p>Additional Information: The Trust must (1) use the Social Security Number of the primary Account owner named in the Bank's records for the Account and (2) be in full force and effect.</p> <p>The Account owners must agree to give the Bank copies of trust documents, additional Trust-related certifications, and/or additional information about the Trust, promptly upon request.</p> <p>Personal Savings Accounts may only be retitled as Revocable Living Trusts (no other forms of trusts are supported).</p> <p>Any beneficiary designation in our records for a Personal Savings Account will be automatically revoked and terminated when the Personal Savings Account is re-titled in the name of a revocable living trust.</p> <p>For more information call: 1-800-446-6307</p>


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Online Bank	Support for Trusts?	How Online Bank Handles Trust Accounts
	<p style="text-align: center;">Yes</p> <p style="text-align: center;">Account Can be Titled in Name of Revocable Trust</p> <p style="text-align: center;">Irrevocable Trusts are Available, but not Compatible with Max</p> <p style="text-align: center;">-</p> <p style="text-align: center;">Trust Can be Named as Payable On Death (POD) Beneficiary</p>	<p>Ally Bank supports both Revocable and Irrevocable Trusts. Max is compatible with an Ally online savings account held by a Revocable Trust, but is not compatible with Irrevocable Trusts at this time.</p> <p>The online application process allows you to specify that a new online savings account is to be held in the name of a trust. To do so, follow the steps on the Ally Bank website.</p> <p>To open an online savings account held by a revocable trust, you will need a copy of: (1) a written Trust agreement; (2) the contact information, birth date and identification number of each Trustee. *</p> <p>During the account opening process on Ally's website, the user may specify a Revocable Trusts as a "Revocable Trust" or "Revocable (Grantor is not a Trustee)". To commence the account opening process you need the formal name of the trust, date of the trust agreement and number of trustees.</p> <p><u>Naming a Trust as POD beneficiary:</u> If the Payable On Death (POD) beneficiary is a minor, charity or Trust, call Ally at 1-877-247-2559. Ally's customer care team will provide you with specific instructions related to your situation.</p> <p>* If you have another account (but not an online savings account) in the name of the Trust at Ally Bank, you only need to provide: (1) the name of the Trust; (2) Social Security Number or Tax Identification Number and contact information.</p>


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Online Bank	Support for Trusts?	How Online Bank Handles Trust Accounts
	<p>Beneficiary Only</p> <p>Account cannot be Held in Name of Trust</p> <p>-</p> <p>Trust Can be Named as Payable On Death (POD) Beneficiary</p>	<p>Barclays only supports Individual, Joint Account With Right of Survivorship, or Accounts for Minors with Right of Survivorship.</p> <p>Without having to establish a trust, you may, subject to applicable law, designate your account to be payable on your death to one or more designated beneficiaries, known as a "payable on death" or "POD" account. You can name a trust as a beneficiary.</p> <p>Max is compatible with a Barclays online savings account that has a Revocable Trust named as a POD beneficiary.</p>


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	<p>Beneficiary Only</p> <p>Account cannot be Held in Name of Trust</p> <p>-</p> <p>Trust Can be Named as Payable On Death (POD) Beneficiary</p>	<p>Revocable trusts can be named as "POD" beneficiary at Radius Bank. Call Radius Customer Support (1-800-242-0272) to learn more about how to designate a trust as a POD beneficiary.</p>

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