

**This bank recognizes that a Court can Create a Trust, and that the terms "Revocable" and "Irrevocable" do not apply to these Trusts.**  
**Trust Certification Form**

Acct No: \_\_\_\_\_ Date: \_\_\_\_\_

Account Class Code: \_\_\_\_\_

Financial Advisor No: \_\_\_\_\_ BR No: \_\_\_\_\_

Destination: USE SENDDOC.TRUSTLIV/TRUSTUW

Retain the original form until the form is imaged.

**A. Trustee Acknowledgment Regarding Tax Identification Number:**

The undersigned direct that the social security number ("SSN") or tax identification number ("TIN") to be used on the above referenced trust account is \_\_\_\_\_. The undersigned further acknowledge that all taxable events for the current calendar year relating to this trust account shall be reported by Edward Jones under the SSN/TIN provided above, regardless of when during the current calendar year the taxable event occurred. For accounts where the grantor of the trust is deceased, the undersigned acknowledge that using a deceased grantor's social security number on this account may result in backup tax withholding. The undersigned acknowledge that, by this document, Edward Jones has advised the undersigned to consult with an independent tax or legal advisor if there are any questions regarding the above referenced account.

**B. Information About Trust**

This form is not a trust instrument and is used to provide and certify to Edward Jones the accuracy of the information about the trust.

An answer is required for all of the following questions.

1. Title/Name of Trust: \_\_\_\_\_

2. Name(s) of the grantor(s)/settlor(s)/person(s) Court who signed created the trust: \_\_\_\_\_

3. Date of original Trust Agreement, Will or Court Order that created the trust: \_\_\_\_\_

4. The trust is:   
 Revocable and Amendable   
 Irrevocable and Amendable   
 Irrevocable and Not Amendable   
 Created by the Court (UCO)

5. Number of current trustees (identified at the end of this document) required to give or approve instructions to Edward Jones regarding this account: \_\_\_\_\_

6. Are there investments not allowed by the trust?   
\_\_\_ Yes \_\_\_ No If "Yes", please mark the investments that are **not** allowed:

- ( ) Asset Backed Securities      ( ) CMO      ( ) Cash Equivalent      ( ) Certificates of Deposit
- ( ) Corporate Debt      ( ) Deferred Annuities      ( ) Government Bonds      ( ) Life Insurance
- ( ) Limited Partnership      ( ) Municipal Securities      ( ) Mutual Funds      ( ) Real Estate Investment Trust
- ( ) Stocks/ETFs      ( ) Unit Trusts