



STERLING & FORT MORGAN FEDERAL

Credit Union

TRUST APPLICATION

New Account

Change

Member No: _____

Trust Information:

Trust Name: _____ **EIN/TIN:** _____

Street: _____ City/State/Zip: _____

Phone: _____ Email: _____ Phone Verification: _____

Type of Trust

Revocable Irrevocable

Grantors

Name: _____ Name: _____
Date of Birth _____ Drver's Lic. # _____ Date of Birth _____ Drver's Lic. # _____

Successor Trustees

Name: _____ Name: _____
Name: _____ Name: _____

Trustee:

Name: Last _____ First _____ MI _____

Street: _____ SSN/TIN: _____

City/State/Zip: _____ Driver's Lic. No: _____

Home Phone: _____ Work Phone: _____ Date of Birth: _____

Cell Phone: _____ Email: _____ Employer: _____ Years: _____

Nearest Relative: _____ Relative's Phone #: _____ Relative Relationship: _____

Trustee:

Name: Last _____ First _____ MI _____

Street: _____ SSN/TIN: _____

City/State/Zip: _____ Driver's Lic. No: _____

Home Phone: _____ Work Phone: _____ Date of Birth: _____

Cell Phone: _____ Email: _____ Employer: _____ Years: _____

Nearest Relative: _____ Relative's Phone #: _____ Relative Relationship: _____

Trustee:

Name: Last _____ First _____ MI _____

Street: _____ SSN/TIN: _____

City/State/Zip: _____ Driver's Lic. No: _____

Home Phone: _____ Work Phone: _____ Date of Birth: _____

Cell Phone: _____ Email: _____ Employer: _____ Years: _____

Nearest Relative: _____ Relative's Phone #: _____ Relative Relationship: _____

Account Agreement:

By Signing Below: You acknowledge receipt of and agree to the terms and conditions contained in the document entitled Membership Package & Disclosures, and any amendment the Credit Union makes to such document from time to time which are incorporated herein. As part of the terms of the agreement, the undersigned and any/all parties to this agreement hereby agree that the Credit Union may, without prior notice to any such parties or beneficiaries, withdraw funds from this account or any other account with the Credit Union and apply funds to satisfy in part or whole any matured loans, advances, or other indebtedness owed to the Credit Union by the undersigned. You promise that everything stated on this application is correct and I/we authorize Sterling Federal Credit Union to verify information provided using any necessary means, including requesting of a credit report by a credit-reporting agency.

(x) _____ Date _____
Trustee

(x) _____ Date _____
Trustee

(x) _____ Date _____
Trustee

(x) _____ Date _____
Trustee

