

CLAIM MY LEGACY

READY-TO-SUBMIT CHECK™

04 - SUBMIT | Carry out the action.

Asset / Account: _____

Institution: _____

Last Four: _____

Action established during REVIEW: _____

Institution requirements confirmed on: _____

BEFORE YOU SUBMIT

- Current institution-required form
- Names and account references checked
- Trust name/date checked when applicable
- Beneficiary information checked when applicable
- Required signatures and dates complete
- Notarization complete when required
- Medallion Signature Guarantee obtained when required
- Required consents obtained
- Supporting documents included
- Submission method confirmed

DON'T SIGN WHAT YOU DON'T UNDERSTAND.

If you are asked to sign something you do not understand, stop and get the question answered before signing or submitting it.