Account Opening Requirements For Wealth Advisors

Trust Name:

FILL OUT ALL APPLICABLE FORMS

- ✓ Trust Profile
- ✓ Investment Objective Form (required for Delegated Trust)

THE FOLLOWING DOCUMENTS ARE REQUIRED

- Legal Documents (Trust Agreement/Amendments/Court Orders)
- Successor Trustee Documents (Resignation/Removal/Appointment/Acceptance, etc.) (if applicable)
- Grantor W-9 & Photo ID/Death Certificate (if applicable)
- Beneficiary W-9s & Photo IDs (W-9 required if distributions are anticipated)/Death Certificates (if applicable)
- Related Parties/Conflict of Interest Disclosure Form
- Signed Engagement Letter (Trustee Fee Schedule) including Patriot Act Notice and Privacy Promise Disclosures
- Tax ID (New Application, if applicable – SS-4)
- Trust Document Review Form (if available)
- Corient Tax Services Engagement Letter (if applicable as indicated on Trust Profile)

Comments:

Completed by:

Signature

Date

Form as of December 2024

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