REVOCABLE LIVING TRUST ACCOUNT ISSUES

ATTACHMENT

Date:

{Name of Member}
{Address of Member}

Dear {Name of Member},

The {name of your credit union} Credit Union's share account card offers individual/single and joint accounts which will ultimately send funds to your estate or to a beneficiary(ies) named on the card. The card, therefore, can facilitate almost any trust need you may have. However, since {name of your credit union} cannot give legal advice, we cannot counsel you as to which account most appropriately meets the specific requirements of your trust.

In order to assist you in selecting the appropriate account, we recommend you take the account card, the card's instructions and the account insurance coverage booklet entitled <u>Your Insured Funds</u> (enclosed) to the attorney who drafted your trust, and have him or her select the account(s) which best meet your needs. Though we understand this may result in some additional expense to you, we believe this is the only way to assure that your intentions are properly carried out.

Once your attorney has advised you which account to select, please return the completed card to us with a copy of the trust, at your convenience, so we may establish an account for the trust.

Should you have any further questions about this matter, please do not hesitate to give {name of person at the credit union who handles trusts} a call at the credit union.

As always, we greatly appreciate your membership with {name of your credit union}, and we look forward to serving you now and in the future.

Very Truly Yours,

{Appropriate credit union employee}