

COFI – Estates Request Form

Instructions. Complete all applicable fields (including required signatures) and attach this form to the Brokerage Account Request Form. In addition, include the following legal documentation:

- Death Certificate
- Copy of Driver's License
- Court Documentation (e.g., Letter of Administration, Letter of Testamentary) – only if you are an Executor / Administrator of the Estate

REPRESENTATIVE INFORMATION

Name: _____

SSN: _____

Residence Address (no P.O. Box): _____

Phone: _____

Email: _____

Relationship to Deceased Customer: ☐ Executor/Administrator of the Estate
☐ Designated Beneficiary/Named Heir on the account(s)

Payee to Reissue Check (If different than Representative Name): _____

DECEASED CUSTOMER INFORMATION

Deceased Customer Name: _____

Deceased Account Information: _____

Deceased's SSN: _____

Deceased's Address (no P.O. Box): _____

Signature: _____

Date: _____