

Trust Membership Deceased

One Trustor Deceased with another Living Trustor

- Original Certified Death Certificate
- Tax ID for Trust may need to be updated to living Trustor for tax purposes
- New Orange County's Credit Union Trust Agreement and Trustee Certification of Trust must be completed

All Trustors Deceased

- Original Certified Death Certificate
- Current/valid government issued ID of Successor Trustee(s)
- Trust documents must be reviewed by Orange County's Credit Union if no Successor Trustee(s) are currently listed on current Orange County's Credit Union Trust Agreement
- EIN Number for IRS tax purposes
- Revocable Trust converts to Irrevocable Trust
- Successor Trustee(s) added to Trust as Trustee(s)
- New Orange County's Credit Union Trust Agreement and Trustee Certification of Trust must be completed

Note: These steps must be completed before closing the trust.