

Resources and Information

Managing the banking relationship after a loss

We understand that this is an emotionally stressful time and we are here to offer support.

Why is the death certificate needed?

The death certificate gives us the information needed to verify the identity and legal residence of our customer.

Can I send a photocopy of the death certificate?

You can send a legible photocopy; however, depending on the circumstances, we may require a certified copy.

Where do I get the death certificate?

A certified copy of the death certificate is generally available from the funeral director who handled the deceased's funeral arrangements, as well as from the Registry of Birth, Deaths and Marriages in the applicable state/county/parish/territory. You may need multiple certified copies of the death certificate when dealing with various institutions in settling the deceased's affairs.

Are there other bank-related considerations that I should be aware of?

Yes, some possibilities to consider include:

- * Direct deposits
- * Debits through ACH
- * Credit card payments
- * Loan payments
- * Investment accounts
- * Retirement accounts
- * Insurance products
- * Safe deposit boxes

IMPORTANT NOTE: Agent named in Power of Attorney or Authorized Signer

A Power of Attorney or Authorized Signer designating another to act on behalf of the account owner (the principal) is valid only during that account owner's lifetime; the power to act ends with the account owner's death.

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