



ESTABLISHMENT DOCUMENTS

Opening a Non-Qualified (Taxable) Account

To open a Non-Qualified (Taxable) Account with Pacific PremierTrust, you'll need:

- Account Application Form
- Transfer on Death Designation Form
- Taxable Account Custodial Account Agreement
- Custodial Addendum
- California Consumer Privacy Act (CCPA) Notice and Taxable Account
- Trust Certification Form
- LP/LLC Addendum
- Certification of Beneficial Owner Form
- Privacy Policy
- Fee Schedule

INSTRUCTIONS

Please complete the enclosed Account Application and the Transfer on Death Designation forms, Trust Certification (where applicable), then return them to Pacific Premier Trust. Review and retain the Custodial Account Agreement, Privacy Policy, CCPA Privacy Notice of Collection and Fee Schedule for your records.

RETURN INSTRUCTIONS

Return the completed forms to Pacific Premier Trust by any of the following methods:

Upload forms to:

PacificPremierTrust.com/upload

Fax to: 303.614.7038

Regular Mail:

FIS-Processing Center
Attn: Pacific Premier Trust
PO BOX 981012
Boston, MA 02298

**Overnight/Express Mail
Deliveries:**

FIS-Remittance Processing
Loading Dock #2
Attn: Pacific Premier Trust
10 Dan Road
Canton, MA 02021

Questions?

Call: 800.962.4238

