



# Appointment of Attorney-in-Fact, Executor, Guardian or Conservator

## IMPORTANT INFORMATION

In order to help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify, and record information that identifies each client who opens an account. When you open an account, we will ask for your name, physical address, date of birth, Social Security number, and other information that will allow us to identify you. We may also ask to see your driver's license or other forms of identification.

## INSTRUCTIONS

Use this form to add an attorney-in-fact (or agent) appointed by a power of attorney, an executor, legal guardian, or conservator relationship to an account. This form must be completed and submitted with required documentation to be granted access to, or open, an account on behalf of another individual.

- An original or certified copy of the legal document giving authority to an attorney-in-fact, executor, legal guardian, or conservator must be submitted along with this form.

### 1. AGENT-FIDUCIARY INFORMATION

- Required fields: Agent-Fiduciary name; date of birth; and social security number OF THE AGENT-FIDUCIARY (not the Account Owner) are required.

\*AGENT-FIDUCIARY NAME

DATE OF BIRTH\*

SOCIAL SECURITY NO.\*

PHONE NO.

MAILING ADDRESS

CITY

STATE

COUNTY

POSTAL CODE

EMAIL ADDRESS

LEGAL PHYSICAL ADDRESS

CITY

STATE

COUNTY

POSTAL CODE

### 2. ACCOUNT OWNER INFORMATION

ACCOUNT OWNER NAME (FIRST, MI, LAST)

PACIFIC PREMIER TRUST ACCOUNT NO.

**MULTIPLE ACCOUNTS:** The Account Owner listed here has multiple accounts at Pacific Premier Trust. Please add this agent-fiduciary relationship to all Pacific Premier Trust accounts held by the Account Owner.

Please change the Account Owner's address to the address listed above.



### 3. AUTHORIZATION

I certify that I am a fiduciary to the Pacific Premier Trust Account Owner identified on this form and that my appointment has not been revoked. I have full power and authority to act as outlined in the documents submitted with this form, and I further agree that my powers relative to the Pacific Premier Trust account may be limited based on the terms of the Account Agreement. I authorize Pacific Premier Trust to process this appointment. I agree to release, indemnify, defend, and hold Pacific Premier Trust and its related entities harmless from any claims arising out of making such appointment including any damages, fees, costs or expenses arising therefrom.

	AGENT-FIDUCIARY SIGNATURE	DATE*
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Pacific Premier Trust performs the duties of an independent custodian of assets for self-directed individual and business retirement accounts and does not provide investment advice, sell investments or offer any tax or legal advice. Clients or potential clients are advised to perform their own due diligence in choosing any investment opportunity as well as selecting any professional to assist them with an investment opportunity.

**NON-DEPOSIT INVESTMENT PRODUCTS ARE NOT INSURED BY THE FDIC; ARE NOT DEPOSITS OR OTHER OBLIGATIONS OF, OR GUARANTEED BY, THE BANK OR ANY OF ITS DIVISIONS; AND ARE SUBJECT TO INVESTMENT RISKS, INCLUDING POSSIBLE LOSS OF THE PRINCIPAL AMOUNT INVESTED.**

Upload forms to:  
[PacificPremierTrust.com/upload](https://PacificPremierTrust.com/upload)  
Fax to: 303.614.7038

Send mail to:  
Pacific Premier Trust  
Processing Center  
P.O. BOX 981012  
Boston, MA 02298

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

Questions?  
Call 800.962.4238

