

Successor Trustee Application

This packet is a breakdown of what you'll need to provide in order to access the account as a successor trustee.

What's included in this packet?

- Applicant Contact Form
- Applicant Identity Verification Form

What documents do I need to provide?

- A copy of your government-issued photo ID
- A copy of the deed showing the real property has been transferred to the trust
- A copy of the trust that names the grantor, trustee (including substitutes), and beneficiaries of the trust

How do I submit my application?

Once you've filled out both forms and collected all the necessary documentation, please send everything to our email address: **support@valon.com**.

If you have any questions, we're available by phone toll-free at 855-218-3690 (Monday–Friday, 9AM–8PM ET).

Applicant Contact Form

- We need this information in order to add your name to the account as a successor trustee.
- Once submitted, we'll review to confirm your status as a successor trustee.
- If confirmed, you can expect to receive an acknowledgment form recognizing your status as a successor trustee on the account.
- Don't forget to keep a copy of this form for your records.

Applicant Name: _____

Relationship to deceased borrower: _____

Property Address: _____

Loan Number: _____

Mailing Address: _____

Email Address: _____

Phone Number: _____

Applicant Identity Verification Form

- We need to verify your identity to protect the deceased borrower's information.
- We'll review this form along with the contact information you're also providing.
- Don't forget to keep a copy of this form for your records.

Applicant Name: _____

Trust Name: _____

Social Security Number (TIN): _____