



Westerra Credit Union Certification of Trust

Title of Trust: _____

Membership/Account number: _____

The trust is in full force and effect, the date of the trust or will (if testamentary trust) is: _____

Date of Amended/Updated Trust is: _____

Colorado law grants credit unions discretion to perform transactions regarding a trust at the request of one or more trustees who complete an affidavit containing certain information about the essential terms of the trust. Correctly completing the below certificate in its entirety supplies such information to allow Westerra Credit Union, in its discretion, to perform transactions regarding the trust at issue with the appropriate trustees.

Settlor/Grantor(s):

_____	_____
Settlor/Grantor(s) Name	Settlor/Grantor(s) Name
_____	_____
Settlor/Grantor(s) Address	Settlor/Grantor(s) Address
_____	_____
Settlor/Grantor(s) Phone Number	Settlor/Grantor(s) Phone Number
_____	_____
Settlor/Grantor(s) Email Address	Settlor/Grantor(s) Email Address
_____	_____
Settlor/Grantor(s) SSN	Settlor/Grantor(s) SSN

Acting and Current Trustees:

_____	_____
Trustee Name	Trustee Name
_____	_____
Trustee Address	Trustee Address
_____	_____
Trustee Phone Number	Trustee Phone Number
_____	_____
Trustee Email Address	Trustee Email Address
_____	_____
Trustee SSN	Trustee SSN



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Trustee Name

Trustee Name

Trustee Address

Trustee Address

Trustee Phone Number

Trustee Phone Number

Trustee Email Address

Trustee Email Address

Trustee SSN

Trustee SSN

Successor Trustees:

Successor Trustee

Successor Trustee

Successor Trustee

Successor Trustee

Beneficiary (ies)

Beneficiary Name

Beneficiary Name

Beneficiary Address

Beneficiary Address

Beneficiary Phone Number

Beneficiary Phone Number

Beneficiary Email Address

Beneficiary Email Address

Beneficiary SSN

Beneficiary SSN

Beneficiary Name

Beneficiary Name

Beneficiary Address

Beneficiary Address

Beneficiary Phone Number

Beneficiary Phone Number

Beneficiary Email Address

Beneficiary Email Address

Beneficiary SSN

Beneficiary SSN



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The trust is: (CHECK ONE)

Irrevocable

Revocable and the name of person holding the power to revoke the trust is: _____

The Trust's U.S. taxpayer identification number: _____

The Trust is governed by the law of the state or other jurisdiction of: _____

The financial powers of the Trustee(s) in the pending transactions

Deposit Accounting, Signing of Checks and Other Instruments

_____ (yes/no) Any one of the persons named as Acting and Current Trustee or Successor Trustee (in the event they have become an Acting and Current Trustee) in this Certification of Trust ("Trustees") is authorized under the above named Trust Agreement to open and maintain deposit and other accounts in the name of the Trust and to collect, deposit, negotiate, endorse, cash, and transfer all checks, drafts, notes and other items and negotiable instruments payable to the Trust or Trustees.

Any one of the Trustees is further authorized to draw, sign and deliver, in the name of the Trust, all checks, drafts, negotiable instruments and other items payable against the funds on deposit with the Credit Union in the name of the Trust.

In addition, any one of the Trustees is authorized to enter into agreement with the Credit Union on behalf of the Trust to implement additional depository and funds transfer services including but not limited to facsimile signature authorization, wires transfer agreements, automated clearinghouse agreements and payroll deposit programs.

Safe Deposit Box Authority

_____ (yes/no) Any one of the persons named as Acting and Current Trustee or Successor Trustee (in the event they have become an Acting and Current Trustee) in this Certification of Trust ("Trustees") is authorized under the above named Trust Agreement to open and maintain a Safe Deposit Box subject to the laws of the State of Colorado, to the terms and conditions given to the undersigned by the Lessor, and may hereafter adopt.

Borrowing Authorization

_____ (yes/no) The undersigned certify and represent to the Credit Union that the Trust Agreement authorized the Trust to incur indebtedness and further authorized any one of the Trustees to borrow money and to obtain lines of credit on behalf of the Trust, from the Credit Union. As Collateral for any existing or future obligations of the Trust, the Trust is empowered to pledge and encumber assets owned by the Trust. Any one of the Trustees is further authorized to execute and deliver on behalf of the Trust promissory notes, security instruments, loan documents, and other instruments related to borrowing of the Trust. Any one of the Trustees is further authorized to execute any agreement of hypothecation, pledge or other agreement on behalf of the Trust with respect to indebtedness of the



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others and to execute assignments and endorse such instruments as may be necessary to assign or subordinate to Credit Union any obligations or debts owed to the Trust by other persons or entities.

Acknowledgement

We acknowledge that each of the Trustees can act independently of each other and that there are not any transactions that would need more than one of the Trustees to conduct.

We acknowledge that you will be relying solely on these certifications, and that you will not review or interpret the trust for any matters relating to such certifications and operation of the Account(s), even if you are provided with a copy of the trust. The Trust has not been revoked, modified, or amended in any manner which would cause the representations contained in this certification to be incorrect. We agree to inform the Credit Union, in writing, immediately if: (a) there is any subsequent amendment to the Trust, including any change in successor trustee(s); (b) any Trustee dies or becomes incapacitated; or (c) there is any other change in Trustees or any other event which could materially alter this certification. In the event of the death or incapacity of one or more of the Trustees, the Credit Union may continue to act on the instructions of any remaining Trustees unless we specifically notify the Credit Union otherwise in writing and provide you with an updated certification.

If we do not name or, if applicable, update the Successor Trustee in this certification, we acknowledge that the Credit Union may require a legal opinion and/or other documentation prior to allowing a Successor Trustee to act.

We, jointly and severally, in our personal capacities and on behalf of the Trust, agree to indemnify the Credit Union and each of its affiliates, officers, directors, employees and agents from, and hold them harmless from, any loss, damage, claim, expense or liability arising, directly or indirectly out of breach of any representation or warranty, or from acting upon any instructions given by us or by any third party named pursuant to a power of attorney, delegation, or similar document, or otherwise acting in reliance on these representations and warranties.

Any notice sent by the Credit Union to any of us, including notice sent electronically, will constitute a notice to all Trustees.

We hereby certify that all Trustees of the Trust have been listed and that those Trustees signing below have authority to furnish a certification of the Trust.

Acknowledgement executed on _____ day of _____, 20____.

Trustee Name

Trustee Signature (must sign as Trustee or TTEE)

Trustee Name

Trustee Signature (must sign as Trustee or TTEE)



Westerra Credit Union Certification of Trust

Trustee Name

Trustee Signature (must sign as Trustee or TTEE)

Trustee Name

Trustee Signature (must sign as Trustee or TTEE)

The foregoing instrument was acknowledged before me this _____ day of _____ 20_____

(Notary's official Signature)

(Commission Expires)

Westerra CU Rep _____

Acknowledgement executed on _____ day of _____, 20_____.

Trustee Name

Trustee Signature (must sign as Trustee or TTEE)

Trustee Name

Trustee Signature (must sign as Trustee or TTEE)

Trustee Name

Trustee Signature (must sign as Trustee or TTEE)

Trustee Name

Trustee Signature (must sign as Trustee or TTEE)

The foregoing instrument was acknowledged before me this _____ day of _____ 20_____

(Notary's official Signature)

(Commission Expires)

Westerra CU Rep _____