

Personal Representative Information Form



Wings Credit Union may permit a court-appointed Personal Representative to process estate settlement transactions **upon completion of this form and receipt of the following items:**

- ☐ Original (or certified copy) of the Personal Representative documents
- ☐ Certified death certificate
- ☐ Copy of the Personal Representative's valid photo identification

Deceased Member's Information

Member Name _____ Wings ID _____

Personal Representative Information

Personal Representative Name _____ Wings ID (if applicable) _____

Date of Birth _____ U.S. Tax Identification Number _____

Residence Address (cannot be P.O. Box) _____ City _____ State _____ ZIP Code _____

Mailing Address (if different from above) _____ City _____ State _____ ZIP Code _____

Phone Number _____ ☐ Landline ☐ Cell Phone _____ Email Address _____

Place of Birth (City/State) _____ Occupation/Previous Occupation _____ ☐ Retired ☐ Self-Employed ☐ Unemployed

ID Number _____ Issuing State/Country _____ ID Expiration Date _____

ID Type: ☐ Driver's License ☐ Passport ☐ State ID

Notarization

As further acknowledgement of the above, before me, the undersigned Notary Public, personally appeared:

Personal Representative Name _____ Personal Representative Signature _____

State _____ County _____

Subscribed and sworn before me

this _____ Day _____ of _____ Month _____, 20 _____

(Seal)

Notary Public _____

CU Use Only:

Completed By # _____ Date _____ Reviewed By # _____