Clear

Navy Federal®

Deposit Trust Account Closure

Use this form to close accounts in the name of a Legal Trust and disburse those funds. Only a current serving trustee can request to close all accounts under the trust record. If trustee is not a member, the request needs to include the following items:

- Verified trust documents showing the non-member is the successor trustee
- Copy of Government-Issued Photo ID

Section A. Account Title

Name of Legal Trust	Trust Access No.

Section B. Trustee Information

Name: First	MI	Last	Trustee Phone No.	Trustee Access No.

Section C. Close Trust Accounts

☐ I would like to close the/all account(s) under the Legal Trust.

Section D. Distribution Instruction* *(Choose your disbursement instructions below.)*

Transfer to the following Navy Federal Account No.(s):

Account No.	Account Owner's Name	Account Type	Amount ☐ Full Amount
Account No.	Account Owner's Name	Account Type	Amount

Send Check Payable To:

Payee Name(s)	Name of Financial Institution *(if applicable)*	Account No. *(if applicable)*	Amount ☐ Full Amount

Check Mailing Address: Street	City	State	ZIP Code

Wire Funds to Other Financial Institution *($20 wire fee may be applicable.)

Name of Financial Institution	Routing Number	Account No.
Name on Account	Amount ☐ Full Amount	Account Type

Financial Institution Address: Street	City	State	ZIP Code
Account Owner Address/Other Financial Institution: Street	City	State	ZIP Code

*If multiple different disbursements are needed, please use a second copy of the form.

NOTE: If funds cannot be disbursed evenly, please indicate who will receive overage. Name:

Section E. Required Signature *(By signing this section, I understand my Trust account(s) will be effectively closed.)*

Signature of Trustee *(required)*	Date *(MM/DD/YY)*

To expedite your request, please return this completed form using one of the following methods:	
1. Mobile or Online Banking: Attach form via eMessage	2. Fax to Navy Federal at 703-206-3724
3. Visit local branch	4. Mail form to PO Box 3002, Merrifield, VA 22116-9887

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