



CLAIM REQUEST FORM

Name: _____

Address: _____

City, State, and Zip code: _____

Today's date: _____

Owner's name reported as: _____

Provide your Social Security Number (SSN) or the Employer Identification Number (EIN) of your business or organization. If you are not the owner of the account, also provide the owner's SSN.

Your SSN or EIN

and/or

Owner's SSN if not Claimant

I declare that this form and accompanying documents have been examined by me and, to the best of my knowledge and belief, are true, correct and complete.

Your Signature

Date

Daytime Telephone Number: (____) _____

Please provide the following information; without it we cannot process your claim request.

- 1. Your SSN or EIN.**
- 2. Your signature on the Claim Request Form.**
- 3. A clear copy of your photo ID.**
- 4. Your daytime telephone number.**
- 5. A copy of the death certificate if the owner is deceased.**

For Office Use Only

Amount \$ _____ **# Shares** _____ **Approved By** _____ **Date** _____



UNCLAIMED PROPERTY CLAIM REQUEST FORM INSTRUCTIONS



If you are an individual claiming property, you must provide:

Photo ID: Examples include a copy of a driver's license, passport, or military ID card.

Social Security Number(s): Your SSN and the account owner's SSN if you are not the owner.

Documentation of owner's last known address if listed on the request form: Examples include postmarked envelopes, bills, cancelled checks, or title to property.

Documentation of owner's name change if different name appears on the request form: Examples include a copy of a marriage license, divorce papers, or other legal documentation.



If you are not the reported owner, you must also provide:

If owner is deceased: A copy of the owner's death certificate and a copy of the owner's will, obituary, or probate documents.

If owner is not deceased: A power of attorney.



If you are claiming property for your business, you must provide:

Photo ID of individual submitting claim: Examples include a copy of a driver's license, passport, or military ID card.

Employer Identification Number: The EIN of your business or organization.

Documentation showing your position and authority to make a claim: Examples include a business card or authorization letter on company letterhead.

We may require other documentation to process your claim request.