

**PARKWAY BANK & TRUST COMPANY**  
**AFFIDAVIT OF SUCCESSOR BENEFICIARY**

PARKWAY BANK & TRUST COMPANY, TRUST NO: \_\_\_\_\_

**SECTION 1:**

Under the terms of the referenced Trust, the undersigned is a successor beneficiary to the beneficial interest under said Trust which was opened by: \_\_\_\_\_  
(deceased party)  
prior to his (her) death on: \_\_\_\_\_.  
(date)

**SECTION 2:**

The undersigned does hereby, certify, confirm, and approve the terms of said Trust Agreement, as successor beneficiary hereunder, and further authorizes Parkway Bank & Trust Company, as Trustee to hereafter act in any matter concerning the Trust, the Trust property, or proceeds of any nature, insofar as the interest of the undersigned is concerned upon the written direction of the following party (or parties):  
\_\_\_\_\_  
\_\_\_\_\_

**SECTION 3:**

Further, the undersigned certify, confirm, and approve that Parkway Bank & Trust Company shall receive an annual fee for its services so long as any property remains in the Trust and that any request for documentation or transactions will be billed in accordance with the most current fee schedule. Effective immediately the following named person should receive all billing and correspondence of any nature and agrees to notify all current beneficiaries of same.

\_\_\_\_\_  
(name)  
\_\_\_\_\_  
(address)

Printed Name: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Address and Phone: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Signature

The undersigned Notary Public certifies the party(ies) signing above appeared in person before me with proper identification or is personally known to me. They acknowledged signing this document as their own free and voluntary act on this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

\_\_\_\_\_  
Notary Public

**IMPORTANT:**

A **CURRENT** PHOTO ID FOR THE PARTY SIGNING ABOVE MUST BE SUBMITTED WITH THIS FORM. DRIVER'S LICENSE, STATE OR GOV'T ID, AND PASSPORT ARE ACCEPTABLE FORMS OF ID. PLEASE MAKE SURE THE ID #, EXPIRATION DATE, PHOTO, DATE OF BIRTH AND SIGNATURE ARE LEGIBLE. (if the expiration of the driver's license has been extended by sticker on the backside, please copy both sides)

THE OMISSION OF THE PHOTO ID MAY DELAY THE PROCESSING OF THIS INFORMATION.

**PLEASE CONTACT PARKWAY BANK & TRUST COMPANY, TRUST DEPARTMENT WITH ANY QUESTIONS. 708-867-6600**