

CONSERVATORSHIP ACCOUNT

OVERVIEW GUIDE

01.

WHAT IS YOUR ROLE:

A Conservator is a legal arrangement in which a judge appoints an individual to take legal responsibility for another person. This responsibility often includes managing the person's personal and financial affairs. The individual under conservatorship is referred to as the conservatee, while the appointed individual managing their affairs is called the conservator.

A conservator's primary responsibility is to make decisions that are in the best interests of the conservatee and manage their assets accordingly.



02.

GETTING PREPARED:

- Court Order designating Conservator.
- Social Security Number and Date of Birth of the Beneficiary.
- Valid Identification for the Conservator.

Existing personal accounts cannot be converted into a Conservatorship account; a new account must be established.



03.

LET'S GET STARTED:

Once you have collected the necessary documents mentioned above, let's begin the process of opening the Conservatorship account.

Please visit one of our Engagement Centers, contact us by phone or use live video banking to schedule a virtual consultation with an Account Specialist and to submit any account opening documents you have collected, as this will help expedite the process.



04.

WE'LL TAKE IT FROM HERE:

With improvements to our account opening process, we now provide a simplified and streamlined virtual experience for you.

Within a few business days, one of our Account Specialists will contact you to review your request, obtain any additional documents or information if necessary, and address any questions you may have about the account and/or the account opening process.



05.

YOUR ALL SET:

Once everything is finalized, we will provide you with the account number and send the necessary documents and disclosures electronically for you to sign (If in-person signing is required, we can arrange this upon request).

The account is now active and ready for use.

