

# Trust Certification Form - Taxable Accounts

## IMPORTANT INFORMATION

This form should only be completed for taxable accounts established for a trust. Columbia Private Trust will not accept this certification for use with a retirement plan.

## TRUST AGREEMENT

Along with this form, you must also include a copy of the first and signature pages of the trust agreement.

Please **DO NOT** forward a full copy of the trust agreement and other trust documents unless specifically requested to do so. Columbia Private Trust in its role as account custodian cannot and will not interpret the terms of the trust agreement or other trust documents. If such an interpretation is required, the trustee(s) must obtain a legal opinion of the trust agreement's terms. The custodian will rely solely on the direction of the trustee(s) as to the terms of the trust agreement and other trust documents.

### 1. TRUST INFORMATION

NAME OF TRUST*		TRUST TIN/SSN*	
MAILING ADDRESS*			
CITY*	STATE/PROVINCE*	COUNTY*	POSTAL CODE*

### 2. CERTIFICATIONS

I (We), the undersigned Trustee(s) of the trust named above (the "Trust"), certify that:

The Trust's name and tax identification number are accurately listed above.

The Trust instrument was originally established/executed on \_\_\_\_\_\*

The full name(s) of the/all currently acting Trustee(s) of the Trust is/are listed in the following section.

### 3. TRUSTEE INFORMATION

- Please complete for each acting trustee. Attach additional pages if necessary.

TRUSTEE #1 NAME (FIRST, MI, LAST)*	SSN*	DATE OF BIRTH*	
MAILING ADDRESS*			
CITY*	STATE/PROVINCE*	COUNTY*	POSTAL CODE*
LEGAL PHYSICAL ADDRESS*			
CITY*	STATE/PROVINCE*	COUNTY*	POSTAL CODE*

☐ Sole Trustee

☐ Co-Trustee


### 3. TRUSTEE INFORMATION (CONTINUED)

TRUSTEE #2 NAME (FIRST, MI, LAST)*	SSN*	DATE OF BIRTH*	
MAILING ADDRESS*			
CITY*	STATE/PROVINCE*	COUNTY*	POSTAL CODE*
LEGAL PHYSICAL ADDRESS*			
CITY*	STATE/PROVINCE*	COUNTY*	POSTAL CODE*

Co-Trustee


### 4. SIGNATURES & NOTARY/ACKNOWLEDGMENTS & INDEMNIFICATIONS

- I (we) declare that I am (we are) the trustee(s) of the above-named trust and that all certifications made by me (us) are true and correct.
- I (we) bind the Trust and future trustees to this Agreement and indemnification.
- I (we) designate Columbia Private Trust as custodian for the Fund assets of the Trust.
- I (we) acknowledge that I (we) have read and understand any and all relevant Internal Revenue Code and Treasury Regulation sections that pertain to this Trust Certification and that I (we) fully understand any and all tax implications that may result from distributions and/or tax reporting made pursuant to this certification.
- If there are multiple trustees of the Trust, and this Trust Certification is executed with only one trustee's signature, the sole trustee executing this Trust Certification certifies that he/she has the authority to act severally on behalf of the Trust.
- I (we) agree that Columbia Private Trust will rely solely on the direction of the trustee as to the terms of the trust document; however, Columbia Private Trust in its discretion may at anytime request a certified true and correct copy of the trust document for its review.
- I (we) ratify, approve, and confirm all transactions on the Trust's accounts at Columbia Private Trust that occurred prior to the execution of this Certification.
- I (we) agree to indemnify and hold harmless Columbia Private Trust and each of its officers, directors, shareholders, agents and employees from and against all losses, expenses (including attorney's fees), settlement payments, or judgments incurred by, or entered against Columbia Private Trust as the result of any action taken in reliance on the certifications provided by me (us) on this form.
- The Trust is valid under all applicable laws.
- The Trust has not been revoked, modified, or amended in any manner that would cause the representations contained in the Certification of trust to be incorrect.
- I (we) declare under penalty of perjury under the laws of the state listed below that the foregoing is true and correct. The term Trustee as used in this Certification includes any Trustee or Co-Trustee of the Trust.

SIGNATURES REQUIRED ON NEXT PAGE



**TRUSTEE/ACCOUNT OWNER/PARTICIPANT:**

 TRUSTEE/ACCOUNT OWNER/PARTICIPANT SIGNATURE*	
STATE OF*	COUNTY OF*


The foregoing instrument was acknowledged before me this

DAY*	day of,	NAME OF CURRENT MONTH*	,	YEAR (YYYY)*
NAME OF WITNESS*				


by Witness my hand and official seal

[SEAL]
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My commission expires: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

 NOTARY PUBLIC SIGNATURE*
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**CO-TRUSTEE/ACCOUNT OWNER/PARTICIPANT NAME:**

 CO-TRUSTEE/ACCOUNT OWNER/PARTICIPANT SIGNATURE*	
STATE OF*	COUNTY OF*

The foregoing instrument was acknowledged before me this

DAY*	day of,	NAME OF CURRENT MONTH*	,	YEAR (YYYY)*
NAME OF WITNESS*				

by Witness my hand and official seal

[SEAL]
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My commission expires: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

 NOTARY PUBLIC SIGNATURE*
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© 2025 Columbia Private Trust, a Division of Columbia Bank. All Rights Reserved. Columbia Private Trust performs the duties of an independent custodian of assets for self-directed retirement and custodial accounts and does not provide investment advice, sell investments or offer any tax or legal advice. Clients or potential clients are advised to perform their own due diligence in choosing any investment opportunity as well as selecting any professional to assist them with an investment opportunity. Columbia Private Trust is not affiliated with any financial professional, investment sponsor, or investment, tax, or legal advisor.

NON-DEPOSIT INVESTMENT PRODUCTS ARE NOT INSURED BY THE FDIC; ARE NOT DEPOSITS OR OTHER OBLIGATIONS OF, OR GUARANTEED BY, THE BANK OR ANY OF ITS DIVISIONS; AND ARE SUBJECT TO INVESTMENT RISKS, INCLUDING POSSIBLE LOSS OF THE PRINCIPAL AMOUNT INVESTED.

**Upload forms to:**  
[ColumbiaPrivateTrust.com/Upload](https://ColumbiaPrivateTrust.com/Upload)  
**Fax to:** 303.614.7038

**Send mail to:**  
Columbia Private Trust  
Processing Center  
P.O. Box 981012  
Boston, MA 02298

**For express deliveries:**  
FIS-Remittance Processing  
Loading Dock #2  
Attn: Columbia Private Trust  
10 Dan Road  
Canton, MA 02021

**Questions?**  
Call 800.962.4238

