

PROFESSIONAL CONSERVATOR INSTRUCTIONS AND AFFIDAVIT



1. Professional Conservator Information

ENTITY NAME		
BUSINESS NUMBER		TIN
STREET ADDRESS		CITY
STATE / PROVINCE	ZIP / POSTAL CODE	COUNTRY
MAILING ADDRESS (if different from above)		CITY
STATE / PROVINCE	ZIP / POSTAL CODE	COUNTRY

2. Person Authorized to Transact on the Professional Conservatorship Account(s)

LEGAL AGENT NAME		DATE OF BIRTH
STREET ADDRESS		CITY
STATE / PROVINCE	ZIP / POSTAL CODE	COUNTRY

3. Incapacitated Person Information

INCAPACITATED PERSON NAME		DATE OF BIRTH
STREET ADDRESS		CITY
STATE / PROVINCE	ZIP / POSTAL CODE	COUNTRY
CONSERVATORSHIP CASE NUMBER		

4. Existing Account Information (if available)

ACCOUNT NUMBER AND BALANCE	ACCOUNT NUMBER AND BALANCE
ACCOUNT NUMBER AND BALANCE	ACCOUNT NUMBER AND BALANCE

5. Conservatorship Agreement, Authority, and Instructions

Check all applicable items.

- ☐ I have the authority to change the address on the Incapacitated Person's account to my business address as provided in the section above.
- ☐ I have the authority to restrict the Incapacitated Person from accessing his/her account(s).
- ☐ I have the authority to remove all Joint Account Holders.
- ☐ I have the authority to restrict all Joint Account Holders from access to accounts.
- ☐ I have the authority to cancel all Joint Account Holders' ATM cards, Online Banking, and Remote Services.
- ☐ I agree to notify BECU in writing of any change(s) in my legal status as Conservator of the Incapacitated Person indicated above, and I understand that BECU is relying on the information provided herein and will only rely upon written notification concerning my legal status as Conservator when conducting business with me as Conservator for the Incapacitated Person indicated above.
- ☐ I agree that all joint account holders will be removed from any deposit accounts that the incapacitated person is the tax owner on.
- ☐ I agree that the incapacitated person will be removed from any deposit accounts that they are a joint account holder on.

5. Conservatorship Agreement, Authority, and Instructions (continued)

- ☐ I agree to notify any Joint Account Holders of the changes made to the Incapacitated Person's account(s), as described in BECU's Account Agreements.
- ☐ I agree that I cannot be added as a Joint Account Holder on the Incapacitated Person's account.
- ☐ I agree that BECU has given me no advice. I expressly assume the responsibility for any adverse consequences that may arise from this Professional Conservatorship Instructions and Affidavit and I agree that BECU shall in no way be held responsible.
- ☐ I agree that BECU may suspend any available lines of credit currently held in the Incapacitated Person's name.
- ☐ I agree that if I choose to have access to Online Banking and remote services, I will have simultaneous access to my personal accounts and the Conservatorship account on which I am Conservator, and BECU shall have no liability for my transactions resulting in commingling of funds.
- ☐ I am an agent with legal authority to act on behalf of the Professional Conservator business entity indicated above.

6. Conservator Instructions

1. Place stop payment on all outstanding checks.	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Place stop payment on all preauthorized debits.	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Place a court-ordered block on the Incapacitated Person's accounts.	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. Close existing Home Equity Line of Credit. (Borrower shall remain liable for any outstanding debt.)	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. Close existing Personal Line of Credit (Borrower shall remain liable for any outstanding debt.)	<input type="checkbox"/> Yes <input type="checkbox"/> No
6. Close existing Credit Card(s) (Borrower shall remain liable for any outstanding debt.)	<input type="checkbox"/> Yes <input type="checkbox"/> No

Special Instructions:

7. Professional Conservator Affidavit

- The attached copy of Letters of Conservatorship or Letters of Office, and Order Appointing Conservator are true and correct copies or originals duly issued by the court.
- As of this date, I am the Legal Agent of and legally authorized to act in the capacity of and on behalf of the duly appointed Professional Conservator business entity named above with the authority over the assets held by BECU but owned or subject to withdrawal or delivery to a BECU depositor.
- I understand and agree that pursuant to the Revised Code of Washington 11.92.096, BECU may rely on this Professional Conservator Instructions and Affidavit without inquiry and shall not be subject to any liability of any nature whatsoever to any person whatsoever, including but not limited to BECU's depositor or any other person with ownership or other interest in or right to asset(s) including, but not limited to, delivery of asset(s) to the Conservator.
- I will and do receive delivery or control of each asset solely in my capacity as the Legal Agent of the Professional Conservator business entity named above who is named as Conservator. By signing below, I declare under penalty of perjury under the laws of the state of Washington that all the information provided above and the statements made in this affidavit are true and correct, and it is executed at the place and on the date indicated below.

LEGAL AGENT SIGNATURE

DATE AND PLACE

8. Notary Public

STATE OF	COUNTY OF	NOTARY STAMP
SIGNED AND AFFIRMED BEFORE ME ON		
NOTARY NAME (printed)		
NOTARY SIGNATURE		
RESIDING IN	MY APPOINTMENT EXPIRES	