

Legal Entity:	Trust
Trust Tax ID #	You must ensure that a copy of an IRS application for tax id has been received from the client as evidence per Private Bank Policy.
Trust / Estate Situs (Domicile):	XX
JPM Executor or Trustee?	☐ Yes - Sole ☐ Yes - Joint ☒ No
Fiduciary Manager	
Non JPM Trustee(s) / Executor(s):	

Complete this section for Non-JPM trustees / executors.

Primary Non JPM Trustee/Executor is an	☒ Individual ☐ Organization
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List the following information for the Primary Non JPM trustee / executor.If an Organization, please list under "Last Name" section and mark "First name" with a dash (-).

Last Name :	Darren
First name :	K
Middle Name/Initial:	Indyke
Address Line 1:	457 Madison Ave
Address Line 2:	4th Floor
City:	New York
State	NY
Province:	
Country:	UNITED STATES
Postal/Zip Code:	10022
Contact Phone:	()
Date of Birth :(mm/dd/yyyy)	

What form of government issued identification document did you obtain for the files?
Driver's License

Tax ID / Social Security Number	
Passport/Drivers License #	

List any additional Non JPM trustees / executors in the following table.

Name	Date of Birth (mm/dd/yyyy)	Form of Govt Issued ID Obtained	Passport # / DL #	Tax ID
Lawrence Newman		Driver's License		

Grantor of Trust / Estate Assets:	
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List the following information for the grantor.

Grantor is an	☒ Individual ☐ Organization
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If an Organization, Please list the legal name under "Last Name" section and mark "First name" with a dash (-).

Is the Grantor Deceased ?	☐ Yes ☒ No
Last Name :	Epstein
First name :	Jeffrey
Middle Name/Initial:	
Address Line 1:	457 Madison Ave
Address Line 2:	4th Floor
City:	New York
State:	NY