

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

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:

List the following information for the grantor.

Grantor is an Individual Organization

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

Province:

Country: UNITED STATES

Postal/Zip Code: 10022

Contact Phone: ()