

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): NY

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 : Epstein

First name : Jeffrey

Middle Name/Initial:

Address Line 1: 6100 Red Hook Quarter B3

Address Line 2:

City: xx

State: XX

Province: St. Thomas

Country: VIRGIN ISLANDS (U.S.)

Postal/Zip Code: 00802

Contact Phone: ()

Date of Birth :(mm/dd/yyyy) 01/20/1953

What form of government issued identification document did you obtain for the files?

Driver's License

Tax ID / Social Security Number

Passport/Drivers License # United States Virgin Islands D/L - DD C-000000029913 - CI - 0000025874

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

Table with 5 columns: Name, Date of Birth (mm/dd/yyyy), Form of Govt Issued ID Obtained, Passport # / DL #, Tax ID. Row 1: Darren K. Indyke, [Redacted], Driver's License, [Redacted], [Redacted]

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:

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