

Navy Federal®

Deposit Trust Account Closure

Use this form to close accounts in the name of a Legal Trust and disburse those funds. Only a current serving trustee can request to close all accounts under the trust record. If trustee is not a member, the request needs to include the following items:

- Verified trust documents showing the non-member is the successor trustee
- Copy of Government-Issued Photo ID

Section A. Account Title	
Name of Legal Trust	Trust Access No.

Section B. Trustee Information		
Name: First MI Last	Trustee Phone No.	Trustee Access No.

Section C. Close Trust Accounts
<input type="checkbox"/> I would like to close the/all account(s) under the Legal Trust.

Section D. Distribution Instruction* (Choose your disbursement instructions below.)			
Transfer to the following Navy Federal Account No.(s):			
Account No.	Account Owner's Name	Account Type	Amount
Account No.	Account Owner's Name	Account Type	Amount
Send Check Payable To:			
Payee Name(s)	Name of Financial Institution (if applicable)	Account No. (if applicable)	Amount
Check Mailing Address: Street	City	State	ZIP Code

Wire Funds to Other Financial Institution (\$20 wire fee may be applicable.)*			
Name of Financial Institution	Routing Number	Account No.	
Name on Account	Amount		
Financial Institution Address: Street	City	State	ZIP Code
Account Owner Address/Other Financial Institution: Street	City	State	ZIP Code

\*If multiple different disbursements are needed, please use a second copy of the form.

NOTE: If funds cannot be disbursed evenly, please indicate who will receive overage.

Section E. Required Signature (By signing this section, I understand my Trust account(s) will be effectively closed.)	
Signature of Trustee (required)	Date (MM/DD/YY)

To expedite your request, please return this completed form using one of the following methods:	
1. Mobile or Online Banking: Attach form via eMessage	2. Fax to Navy Federal at 703-206-3724
3. Visit local branch	4. Mail form to PO Box 3002, Merrifield, VA 22116-9887

