



# Information needed to open an Estate Account

## Estate Accounts

- Deceased needed to be a member at the time of their death in order to open an Estate Account at Soo Co-Op Credit Union
- Death Certificate
- Court documents appointing the Personal Representative of the Estate
- Personal information on Personal Representative:
  - Name
  - Date of birth
  - Physical address
    - *Proof of address may be required if it is not up to date on your ID*
  - Mailing address (if applicable)
  - Employment-Occupation
  - Tax ID Number
  - Valid Unexpired Government Issued ID  
(i.e. driver's license, state identification card, military id, etc.)
  - Phone number and email address (if applicable)