



## Death of a single account owner with payable-on-death or in trust for

### Step 1 Gather your documents

Depending on the circumstances, we'll need some documents from you to get started.

#### Documents we'll need:

- Copy of the death certificate**
- Letter of instruction**  
A non-legally binding letter from the designated owner, beneficiary, trustee or representative of an estate that contains instructions on what to do with the how to distribute funds in the decedent's account.
- A copy of the beneficiary's driver's license or other valid form of ID**  
We can accept any of the following:
  - Driver's license
  - U.S. passport or passport card
  - Photo or non-photo ID
  - Immigration card
  - Foreign government-issued passport (must show proof of residence)
  - Permanent residence card
  - U.S. military or common access card

### Step 2 Send us your documents

Documents can be sent digitally, or by mail. If further steps are necessary, a customer care representative will contact you within 10 days of receiving your documents.

#### Digital:

Ally customers can send digital versions of their documents to us via secure message by logging in, selecting **Profile & Settings**, then **Secure Messages**, then **Send a New Secure Message**. Non-Ally customers can call customer care at 1-877-247-2559 to receive a secure link for uploading documents.

#### Mail:

Ally Bank  
P.O. Box 951  
Horsham, PA 19044

#### Need additional assistance? Give us a call.

If you have outstanding questions or need additional account information, we can provide it after receiving your documents. Call us at 1-877-247-2559. We'll be glad to help.