



## Death of a Trustee on a Trust account

### Step 1

#### Gather your documents.

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

We'll need:

- A copy of the death certificate
- Trust documents:
  - Page naming trust title, grantor and trustees
  - Successor trustee page
  - Signature and notary page
  - Most recent amendment (if applicable)
  - [Trust/Trustee Maintenance Request](#)
- A copy of the Trustee's ID

We accept:

- Division of Motor Vehicles (DMV) ID cards
- U.S. passports or passport cards
- Immigration cards
- Permanent resident cards

### Step 2

#### Provide instructions.

You can provide instructions while submitting your documents by:

- Sending us a secure message through our app or at ally.com
- Calling us at 1-877-247-2559
- Sending us a typed or handwritten letter

As a trustee for the decedent's trust, you can:

- Open a new Ally Trust account
- Request to be added to the existing Trust accounts and have the decedent's name removed
- Request a check made payable to the trust



## Death of a Trustee on a Trust account

### Step 3

### Send us your documents and instructions.

Documents can be sent online or by mail. We'll contact you within 7 business days of receiving your documents if we need any more information.

#### **Online:**

- If you have an Ally account, you can send your documents to us by secure message through our app or at [ally.com](https://ally.com)
- If you don't have an Ally account, call us at 1-877-247-2559 and request a secure link to upload your documents

#### **By mail:**

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

#### **Questions?**

Give us a call at 1-877-247-2559. Our award-winning customer care is available 24/7 to help with whatever you need.