

Certification of Trust

A Certification of Trust, also known as a Trust Certification or Certificate of Trust, is a shortened version of a trust document that verifies the existence of a trust and provides key details, while still protecting the privacy of the settlor and beneficiaries.

Common uses for a Certification of Trust include:

1. **Opening a Bank Account:** When opening a bank account in the name of the trust, a Certification of Trust confirms the existence of the trust and the trustee's authority.
2. **Real Estate Transactions:** During the sale or purchase of property, a Certification of Trust verifies the trustee's power to buy or sell property on behalf of the trust.
3. **Investment Management:** Investment firms often require a Certification of Trust to authorize the trustee to manage or transfer investment assets held within the trust.

Certification of Trust Instructions for John Smith

Review your Certification of Trust

- Confirm that the decisions made and the people named are accurate and representative of your wishes
- Make any changes needed on your account ()

Print and execute your Certification of Trust

- Note: Print and execute your Revocable Trust before executing this Certification of Trust.
- Fill in the date of execution for your Revocable Trust in Section I.
- Find a notary public and two witnesses to be present when you sign the document (bring an ID!) Witnesses need to be at least 18 years of age and should not be named in the Trust as beneficiaries of your estate or in any other role
- Sign and date the document where indicated
- Have witnesses sign underneath and fill in their information
- Have the document notarized by the notary

Store and share your Certification of Trust

- Upload the executed copy to your account at
- Share your account and documents with family and other trusted individuals

Certification of Trust

Trust Name and Date

The following trust (referred to herein as the "Trust") is the subject of this Certification of Trust:

John Smith 2024 Revocable Living Trust, under agreement dated the _____ day of _____, 20_____ (the "Trust Agreement")

The Trust has been in existence uninterrupted since _____ (date) and is currently in full force and effect.

Settlor and Trustee

The settlor (referred to herein as the "Settlor") of the Trust is:
John Smith, residing at 3010 East Mexico Avenue, Denver, CO, USA.

The current trustee of the Trust is (referred to herein as the "Trustee"):
John Smith, residing at 3010 East Mexico Avenue, Denver, CO, USA.

Powers of Trustee

The Trustee has all the powers and authorities conferred upon trustees by statute or common law in any jurisdiction in which the Trustee may act, including all powers and authority conferred by the Oklahoma Statutes Title 58 and any amendments thereto.

Revocability

Pursuant to the terms of the Trust Agreement, the Settlor may alter, amend, revoke or terminate the Trust at any time. The Trust has not been terminated, revoked, modified, or amended in any manner that would cause the representations contained in this Certification of Trust to be incorrect, and there have been no amendments limiting the powers of the Trustee over the property of the Trust, as described in this Certification of Trust.

Authority of Multiple Trustees

When multiple trustees are serving as co-trustees of the Trust, each co-trustee shall have the authority to act alone and independently of the other co-trustees then serving, without the need for consultation with, or approval of, any other co-trustee. Any writing signed by

any one of the co-trustees shall be valid and effective for all purposes as if signed by all co-trustees.

Manner of Taking Title

The full legal name of the Trust for purposes of transferring assets into the Trust, titling assets, and conducting business for and on behalf of the Trust, is:

"John Smith, Trustee of John Smith 2024 Revocable Living Trust"

Personal Nature of Trust

The Trust provisions are not attached to this Certification of Trust because they are of a personal nature and set forth the distribution of Trust property. They do not modify the powers of the Trustee. The signatory of this Certification of Trust is currently the acting Trustee of the Trust and declares that the foregoing statements are true and correct, under penalty of perjury.

IN WITNESS WHEREOF, the Settlor and the Trustee have hereunto set their hands as of this _____ day of _____, 20_____.

John Smith, as Settlor and Trustee

Date

We, the undersigned witnesses, certify that the foregoing instrument was signed by the Settlor in our presence as of the date first above written, and declared by the Settlor to be the Settlor's Certification of Trust, and we, the undersigned witnesses, sign our names hereunto as witnesses at the request and in the presence of the Settlor and in the presence of each other, at the Settlor's request.

Witness Signature

Witness Signature

Witness Printed Name

Witness Printed Name

Witness Address

Witness Address

Date

Date

STATE OF OKLAHOMA

COUNTY OF _____

ACKNOWLEDGED AND SUBSCRIBED before me by the Settlor, John Smith, who is personally known to me or has shown identification, and sworn to and subscribed before me by each of the following witnesses: _____ who is personally known to me or has shown identification; and _____ who is personally known to me or has shown identification. Subscribed by me in the presence of the Settlor and the subscribing witnesses, by the means specified herein, all on the _____ day of _____, 20_____.

(SEAL)

Notary Public

My commission expires