

**CERTIFICATION OF TRUST**  
**Pursuant To California Probate Code 18100.5**

The undersigned declare(s) under penalty of perjury under the laws of the State of California that the following facts are true and correct:

1. **Name of Trust.** The exact name of the Trust is:

\_\_\_\_\_.

2. **Date of Trust.** The date of the trust instrument is \_\_\_\_\_.

3. **Settlor(s).** The exact name(s) of the Settlor(s) is (are):

a. \_\_\_\_\_

b. \_\_\_\_\_

4. **Trustee(s).** The exact name(s) of the currently acting Trustee(s) is (are):

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

d. \_\_\_\_\_

5. **Successor Trustee(s).** The exact name(s) of the Successor Trustee(s) is (are):

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

d. \_\_\_\_\_

6. **Powers of the Trustee(s).** The power of the Trustee(s), at a minimum, include, but may not be limited to the following (check all that apply):

- Open and close deposit and investment accounts, including mutual funds, annuities, non-deposit investment productions, and other uninsured vehicles, on behalf of the Trust; deposit funds into, sign checks drawn upon, and withdraw funds from the accounts established for the Trust; all without limitation or the consent of any other person..
- Open and close Safe Deposit Box(es) on behalf of the Trust; enter into rental agreements for, deposit Trust property into, and withdraw Trust property from such Safe Deposit Box(es) established for the Trust.
- Borrow money and grant security interest in real and/or personal property of the Trust as collateral.
- Encumber, mortgage, or pledge Trust property for a term within or extending beyond the term of the Trust in connection with the exercise of any power vested in the Trustee(s).

- Guarantee loans and grant security interest in real and/or personal property of the Trust as collateral.
- Power of Attorney.** Trustee(s) has/have the authority to appoint Attorney(s)-in-fact to be signers on the Trust's deposit and investment accounts; to deposit funds; sign checks drawn upon the accounts; and withdraw funds from the accounts by check and made payable to any person, including the Attorney(s)-in-fact. I/We hereby desire to appoint the Attorney(s)-in-fact named on the signature card(s) for the Trust's account(s), from time to time. I/We undertake to supervise the Attorney(s)-in-fact as required by law. I/We certify that I/we do not have the ability personally to perform the acts here by delegated to the Attorney(s)-in-fact. (Note: Power-of-Attorney authorization must also be received).

\_\_\_\_\_  
Trustee Signature

\_\_\_\_\_  
Trustee Signature

\_\_\_\_\_  
Trustee Signature

\_\_\_\_\_  
Trustee Signature

**Revocability.** Check the appropriate box.

- Revocable.** The Trust is a Revocable Trust. The name(s) of the parties that have the power to revoke the Trust is (are):

a. \_\_\_\_\_

b. \_\_\_\_\_

- Irrevocable.** The Trust is an Irrevocable Trust.

7. **Number of Trustees.** Check the appropriate box.

- The Trust does not have more than one Trustee.
- The Trust has more than one Trustee and (check one box):
  - The signatures of all Trustees are required to exercise the powers of the Trust, or
  - The signature of \_\_\_\_\_ (enter required number of Trustees) Trustees are required to exercise the powers of the Trust.

8. **Identification Number.** The Trust identification number is \_\_\_\_\_ (either SSN or EIN).

9. **Title.** Title to Trust assets shall be taken in the following fashion:

\_\_\_\_\_.

10. **Attachments.** Provide copies of the following pages of the Trust Instrument and any amendments thereto:

- a. First page,
- b. Signature page,
- c. Trustee(s) information, and

d. Successor Trustee(s) information.

11. **Affirmative Statements.** The undersigned, individually if more than one, affirm the following statements are true and correct under penalty of perjury:

- a. The Trust is a valid and existing trust.
- b. The Trust has not been revoked, modified, or amended in any manner which would cause the representations contained in this Certification of Trust to be incorrect.
- c. This Certification is being signed by all acting Trustees. If this Certification of Trust is signed by Co-Trustee(s), each Trustee certifies himself or herself and not for the other(s). References to the singular includes the plural.
- d. This Certification of Trust is being executed in conformity with the provisions of California Probate Code Section 18100.5.

Date: \_\_\_\_\_ Trustee: \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Printed Name)

Date: \_\_\_\_\_ Trustee: \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Printed Name)

Date: \_\_\_\_\_ Trustee: \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Printed Name)

Date: \_\_\_\_\_ Trustee: \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Printed Name)

**ALL SIGNATURES MUST BE NOTARIZED  
(Probate Code 18100.5(C))**

State of \_\_\_\_\_

County of \_\_\_\_\_

On \_\_\_\_\_ before me , \_\_\_\_\_, a Notary Public, personally appeared \_\_\_\_\_, who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

\_\_\_\_\_  
Signature of Notary Public (Seal)