Use this form to verify a spousal relationship for an account that is transferring assets and/or cash due to a deceased owner. This form must be completed only if the primary owner resides in a community property state.

- Be sure to sign and date the completed request.
- Fax the form to 1-866-650-0003 or mail to the address provided on this form.
- Questions? Call 888-402-0653 (+678-624-6210 from outside the U.S.) from 8 a.m. to 8 p.m. ET, Monday through Friday.

Date: ______________

Account Number(s): ______________________ ______________________ ______________________

Name of Decedent: ______________________

This form is being provided to E*TRADE as notification that the account holder listed above is deceased. In order to properly calculate cost basis when moving assets to the surviving account holder, I recognize that E*TRADE is required to verify the relationship of the account owners that reside in any of the following states:

Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, Wisconsin

This form should serve as confirmation that ______________________ was legally married to the decedent and the joint account assets were held in one of the community property states listed above. ☐ Yes ☐ No

As the surviving account holder, I acknowledge under penalty of perjury that the above information is true and accurate.

Signature of Surviving Account Owner: ______________
Date: ______________

The E*TRADE Financial family of companies provides financial services including trading, investing and related banking products and services to retail investors.

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