

Account Access Instructions – Updated: 3/3/2021

Name of Institution: Bank of America

- 1) Type: **Joint Checking Account** (Online Access)
Account Number: 00-9323-6750 (\$3,000 Average Balance)
Account Registration: John J or Jane H Doe, POD John Doe Jr. and Lynda Martin (Daughter)
- 2) Type: **Joint Money Market**: (Online Access)
Account Number 00-5678-8965 (\$195,546 Average Balance)
Account Registration: John J. Doe and Jane H. Doe Revocable Trust dated 2/14/2016
- 3) Type: **Money Market** (No online access)
Money Market Account Number: 10-9876-4467 (\$45,000)
Account Registration: Jane H. Doe, POD John Doe Jr. and Lynda Martin (Daughter).
- 4) Type: **Personal Checking Account** (No online access)
Checking Account Number: 10-6786-4599 (\$1,500)
Account Registration: Jane H. Doe, POD John Doe Jr. and Lynda Martin (Daughter)

Sign In procedures:

1. Open browser and enter: <https://secure.bankofamerica.com/login/sign-in/signOnV2Screen.go>
2. Enter User ID: 14597654 (CLICK Sign On)
 - a. Security Image is Pencil
3. Type in password: 49273Jd689 (Takes you to your account page)
4. You can now look at your accounts and pay bills on line.
Note: John's Mac Machine PIN: 4769, Jane's PIN: 8691

If you have questions about these accounts call I 888-123-4567. The files with monthly statements are located in study file cabinet, second drawer. Upon our death, take a death certificate to the bank to change account registration names and beneficiaries. You will also need to obtain the contents of our **safety deposit box #402**, key is located in study desk drawer.

Security Questions:

- Father's middle Name: James
- In what city were you born? Wilmington
- Name of first pet? Max
- Where did you meet your spouse for the first time? Orlando

Notes: Jane does not have online access. She prefers receiving statements by mail. Our home and certain bank and brokerage accounts are registered in our joint revocable trust. The successor trustees are our two children.