



## **DECEASED ACCOUNTS**

### **How to Manage Accounts after a Death**

River Valley Credit Union extends condolences to Members who have lost a loved one. The bereavement period can be difficult at best.

If your loved one had any account relationship with River Valley Credit Union, please notify the River Valley **Operations Support Department at 937-859-6260, ext.2218**

**River Valley will need you to provide the following documents:**

- **Original Death Certificate**
- **Probate paperwork** (if applicable)

A River Valley Representative may need to follow up with you regarding the accounts involved.

#### **Estate Accounts**

If an Estate account is required, River Valley will need the **Probate** paperwork which includes the **Letters of Testamentary** or **Letters of Administration**.

River Valley will also need the **Tax ID** letter from the **IRS**. River Valley will only open an Estate account for individuals who were members of the credit union at the time of their death.