

Proper Captioning for Verification of Deposit Form for Conservatorships

Name of Account

The account should be captioned in one of the following manners:

1. Joe Doe, Conservator of Mary Doe, a protected individual
2. Joe Doe, Conservator of Mary Doe, a minor
3. Estate of Mary Doe, John Doe, conservator

The Following Are Not Acceptable

1. Joe Doe AND Mary Doe
2. Joe Doe IN TRUST FOR Mary Doe
3. Joe Doe ITF Mary Doe
4. Joe Doe, Trustee for Mary Doe *(unless you were actually appointed Trustee)*
5. Joe Doe, Custodian for Mary Doe
6. Joe Doe, Custodian for Mary Doe under Uniform Gifts to Minors Act (UGMA)