



## WHO IS MIDWEST TRUST?

A full-service wealth management institution formed in 1993 as an independent state chartered trust company, offering complete trust services in the area of personal trust administration, estate planning, investment management, charitable and foundation management, retirement and investment planning, profit sharing and 401(k) programs.

## CUSTOMIZED PLANNING AND ADMINISTRATION

We provide strength and reliability with local expertise and services for your personal and corporate strategies.

- Comprehensive trust administration
- Disciplined and sophisticated investment advisory services with asset allocation strategies appropriate to meet needs of present and future beneficiaries
- Business succession planning in conjunction with your attorney and accountant
- Education and planning for the next generation
- Comprehensive retirement and IRA planning
- Solution based financial planning services

## OUR TRUST AND ADMINISTRATIVE PROFESSIONALS

- Expert administration and trusted advice from specialists with an average of over 25 years' experience
- Estate planning assistance dedicated to providing our expertise to your trusted advisors such as attorneys and accountants
- Expertise of trust officers who understand the regulatory, legal and tax implications of trusts and estate planning under
- Solutions for all of your wealth management needs including real estate, closely-held business, limited partnerships, mineral interests and unique assets



# MIDWEST TRUST

Founded 1993

Treasury Funded Structured Settlement - International  
5901 College Boulevard, Ste. 100  
Overland Park KS 66211  
(913)319-0300

## Authorization for Automated Deposits (ACH Credits)

Customer(s) Name: \_\_\_\_\_ Trust Acct. #: \_\_\_\_\_

I (WE) HEREBY AUTHORIZE MIDWEST TRUST COMPANY, HEREINAFTER CALLED COMPANY, TO INITIATE CREDIT ENTRIES AND TO INITIATE, IF NECESSARY, DEBIT AND ADJUSTMENTS FOR ANY CREDIT ENTRIES IN ERROR TO MY/OUR ( ) CHECKING ( ) SAVINGS ACCOUNT (SELECT ONE) INDICATED BELOW AND THE DEPOSITORY NAMED BELOW, HEREINAFTER CALLED DEPOSITORY, TO CREDIT AND/OR DEBIT SAME TO SUCH ACCOUNT.

Depository Name: \_\_\_\_\_

Branch: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone #: \_\_\_\_\_

Transit/ABA#: \_\_\_\_\_ Account #: \_\_\_\_\_

This authorization will remain in full force and effect until COMPANY has received written notification from me (or either of us) of its termination in such time and in such manner as to afford COMPANY a reasonable opportunity to act on it.

**Please notify Company 10 days before due date.**

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

Phone #: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

# Request for Address Change

*Information About You* (Please type or print)

Name  
Contract Number  
Date of Birth (mm/dd/yyyy)  
Social Security Number    /    /

*Information About Your New Address*

The mailing address for all payments and/or correspondence henceforth due under the above annuity contract should be changed to:

Street Address  
City  
State ZIP

*Authorization*

By signing this document, I hereby declare, under penalty of perjury, that this change of beneficiary is not an attempt to facilitate the acceleration, deferral, modification, anticipation, sale, assignment, pledge or encumbrance of any of the periodic payments due under the above annuity contract.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date (mm/dd/yyyy)

The foregoing instrument was acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_,

\_\_\_\_\_  
Notary Public Signature

My commission expires on (mm/dd/yyyy):