

Beneficiary Disbursement Request Form

FAQ Use one form per beneficiary

Important: Forms that are not completed accurately and notarized will not be processed or returned. A new form will be required.

Required Documents:

- Original or Certified death certificate
- Notarized Beneficiary Disbursement Request form completed by beneficiary
- Copy of state driver's license or government issued ID (front and back) o Note: not required, if beneficiary has an existing Citizens account.
- Certified full trust agreement if TRUST is the designated beneficiary

Do I need to know Decedent's account Information?

- No, however if you do have the information, it is helpful when processing.

Note: If more than four accounts require noting, please attach a handwritten list of accounts and the owner of each.

How are funds paid out?

- Funds will be issued in the form of an Official Check, mailed to the beneficiary's address (as noted on the Beneficiary Disbursement Request form)
- Funds can be transferred to an existing Citizens account

Where do I submit forms and documents?

- Any Citizens branch
- If you reside outside of our branch footprint Mail to:

Citizens-Decedent Account Processing, One Citizens Bank Way JCB270, Johnston, RI 02919

Need more information or have any questions:

Please call us at 800-922-9999

Hours: - Mon-Fri 7am ET- 10pm ET/ Sat-Sun 9am ET- 6pm ET