



At Security Service Federal Credit Union, we understand the settling of accounts can be challenging. We are here to assist you every step of the way as you navigate through this process.

One of our Survivor Assistance Specialists will review all accounts and related documents to determine the distribution of the account funds, notify the appropriate individual(s) of their findings to include any assets and liabilities, and to discuss any necessary documentation for account(s) settlement.

If the accounts are individual under the decedent's name only, and there is no pay on death beneficiary designation(s), court documents for the estate may be required.

Additional documents for the account(s) settlement may include but are not limited to:

- Certified Death Certificate
- Identification of Executor/Administrator and beneficiaries
- Letters Testamentary or Administration, or court documents
- EIN documentation for Trust (IRS letter assigning EIN)
- New or amended Trust documents or Certification

Other products or services which may be impacted but are not limited to include:

- Debts owed
- Safe deposit box
- Online banking
- Direct deposits
- IRAs, CDs, Investments with Security Service Investment Group

Thank you for placing your trust in Security Service Federal Credit Union. A specialist will contact you within 2-3 business days upon notification. PLEASE NOTE: This time may be extended if a management or legal review of documents is required.

Please contact us with any questions or concerns at [SurvivorAssistance@ssfcu.org](mailto:SurvivorAssistance@ssfcu.org) or by calling (800) 832-4602, Monday – Friday, 8:30 a.m. – 5:30 p.m., CST. We are also available by fax at (210) 476-4047 and mail:

Security Service Federal Credit Union  
Attn: Account Services Survivor Assistance  
P.O. Box 691510 | San Antonio, TX 78269-1510