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How to Complete a Pennsylvania Certification of Trust

Certification of Trust • 20 Pa.C.S. § 7790.3

INSTRUCTIONS — KEEP FOR YOUR RECORDS. DO NOT ATTACH THIS PAGE TO YOUR DOCUMENT.

About this form. Banks, brokerages and title companies need proof that a trust exists and who can act for it. Pennsylvania lets the trustee give them this short certification instead of the whole trust agreement, which keeps your family's private terms private.

1. **Copy details from the trust agreement**
   The exact trust name and date, settlor(s), and current trustee(s).
2. **Describe the trustee's powers**
   Check the general powers box or describe any limits.
3. **State revocability and signing rules**
   Who can revoke, and whether one trustee can sign alone.
4. **Show how title is held**
   Institutions use this exact wording on accounts and deeds.
5. **Trustee(s) sign before a notary**
   Bring a current photo ID.

Signing requirements: Signed by the trustee(s) under oath or affirmation before a notary.

After It's Signed

- Give a copy to each bank, brokerage or title company. Keep the original with your trust.

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Have questions about your Certification of Trust? To consult with an attorney, contact **Gavrilov & Brooks Law Firm** at **(916) 504-0529** or **www.gavrilovlaw.com**.

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CERTIFICATION OF TRUST

Commonwealth of Pennsylvania • 20 Pa.C.S. § 7790.3

The undersigned trustee(s), being duly sworn (or affirmed) according to law, certify as follows:

1. **Existence of trust.** The trust exists and was executed on the date stated below:

Name of trust

Date trust executed

2. **Settlor(s).**

Name(s) of settlor(s)

3. **Currently acting trustee(s).**

Trustee name

Address

Trustee name

Address

4. **Powers of the trustee.** The trustee(s) have the power to (describe, or check):

☐ buy, sell, convey, mortgage, lease, invest and otherwise deal with trust property, open and manage accounts, and sign all related documents.

Other or limited powers

5. **Revocability.** The trust is (check one):

☐ Revocable. The power to revoke is held by:

Name(s)

☐ Irrevocable.

6. **Co-trustees.** If there is more than one trustee, (check one):

☐ any one trustee may sign or otherwise authenticate and exercise powers of the trustee.

☐ all trustees must sign.

☐ the following number of trustees must sign:

Number

7. **Taxpayer identification number.**

Trust TIN (or settlor's SSN if a grantor trust; may be omitted where permitted)

8. **Title to trust property.** Title to trust property shall be taken in the following name:

e.g., "Jane Doe, Trustee of the Doe Family Trust dated January 1, 2026"

9. The trust has not been revoked, modified or amended in any manner that would cause the representations in this certification to be incorrect. A person who acts in reliance on this certification without knowledge that it is incorrect is not liable for so acting and may assume the truth of the facts certified, as provided in 20 Pa.C.S. § 7790.3.

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X _____
Trustee signature

Printed name and date

X _____
Trustee signature

Printed name and date

JURAT

COMMONWEALTH OF PENNSYLVANIA

COUNTY OF _____

Signed and sworn to (or affirmed) before me on _____ (date) by _____ (name(s) of individual(s) making statement).

X _____
Signature of notarial officer

Title of office (e.g., Notary Public)

My commission expires

Commission number

(Notary seal)

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