



1607 Cherrywood Lane
Longwood, FL 32750
Phone: 407-682-4111
Fax: 407-682-5511
www.trustaged.org

On-Line Access Form

Trust Account / Client Name: _____

On-line access for viewing trust accountings (statements), disclosures, notices, account balances, and activity, will be available via a secure portal to authorized individuals only. AGED reserves the right to determine who is an authorized individual for each account. Once a request is approved, AGED’s service provider, True Link, will issue via email a secure username, temporary password, and instructions for accessing the secure portal.

Email notifications will be sent from True Link when a new document is available for viewing.

Beneficiary Advocate / Other Individual requesting on-line access:

Name: _____

Email Address: _____

Telephone Number: _____

Please select one of the options below for trust accountings (statements):

- Discontinue printed statements. I no longer wish to receive statements by mail. I will view my statements via the secure on-line portal.
- Continue printed statements. I wish to have statements mailed to me as well as have access to view statements via the secure on-line portal.

*Please note that an action for breach of trust based on matters disclosed in a trust accounting or other written report of the trustee may be subject to a six (6) month statute of limitations from the receipt of the trust accounting or other written report of a trustee posted to the electronic account or website, even if you never access the electronic account or website or the documents. **You may amend or revoke this authorization to receive documents by electronic posting at any time by contacting AGED via mail, email or fax as provided below.***

Please sign and return this form to AGED using one of the following methods:

Mail: 1607 Cherrywood Lane, Longwood, FL 32750

Email: info@trustaged.org

Fax: 407-682-5511

Signature

Date

Printed Name