

TBA WEBINAR ON DVD

When a Safe Deposit Box Customer Dies, What Can You Do?

Tennessee State Laws Covered



PROGRAM DESCRIPTION

After the death of a safe deposit renter, the bank must use care to ensure that proper procedures are followed and the appropriate person is the only one granted access to the box.

Because laws vary in each state, it is sometimes difficult to determine what needs to be done to obtain access. You must be familiar with your state laws and follow them when granting access to a decedent's safe deposit box. Many questions arise as to whom may have access, when they may have access, what items may be removed from a box, and how joint ownership may affect the box.

Learn the basic steps to follow when granting access to a safe deposit box of a deceased renter.

AUDIENCE

This informative session is designed for safe deposit attendants, vault attendants, customer service employees, branch managers, supervisors, tellers, and compliance and training representatives.

KEY TOPICS

- How is the box titled?
- What is the date of death?
- What is the state and county of residence?
- Is there a Will?
- Probate or no probate?
- Who is qualified to have access?
- What documents are needed to grant access?

PRESENTER



Joyce A. McLin, former executive director of The American Safe Deposit Association for 22 years, is considered to be the expert in safe deposit. She has a banking background and has served in various management positions for 15 years, including security officer, safe deposit officer, branch operations officer, personnel director, and marketing and advertising director.

Webinar on DVD: When a Safe Deposit Box Customer Dies, What Can You Do?

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