Estate Services Online

Estate Services Online is the easiest way to manage estate-related matters securely and conveniently. Here you can view and manage your case, upload required documents, and complete essential forms—all from your computer or mobile browser.

Bank of America customers

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BANK OF AMERICA

Log in to Online Banking

Step 1

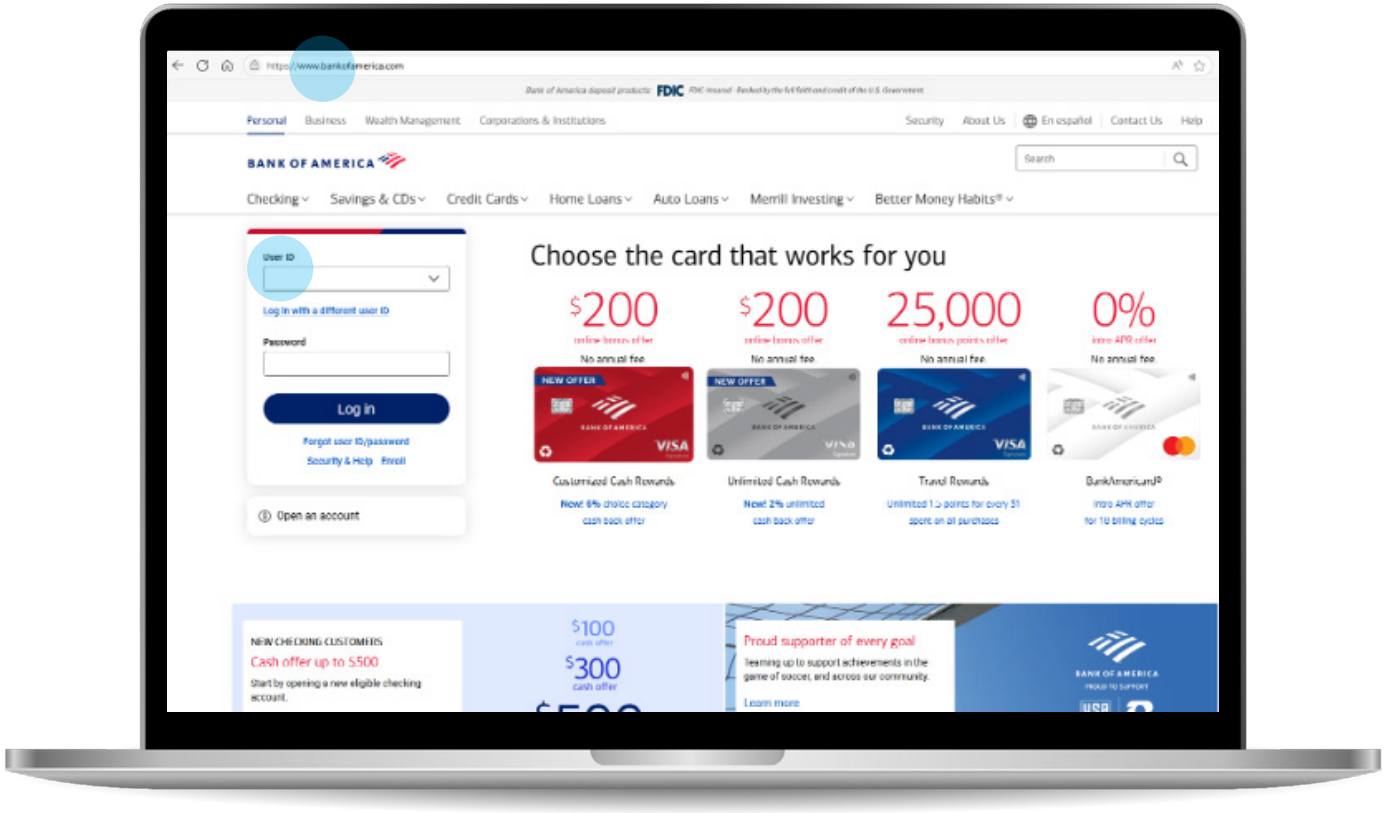
Visit bankofamerica.com on your computer or mobile device.

Step 2

Log in to Online Banking with your regular User ID and password.

Don't have an Online Banking account? Enroll in Online Banking here.

Troubleshooting: Forgot your password? Click **Forgot Password?** and follow prompts.

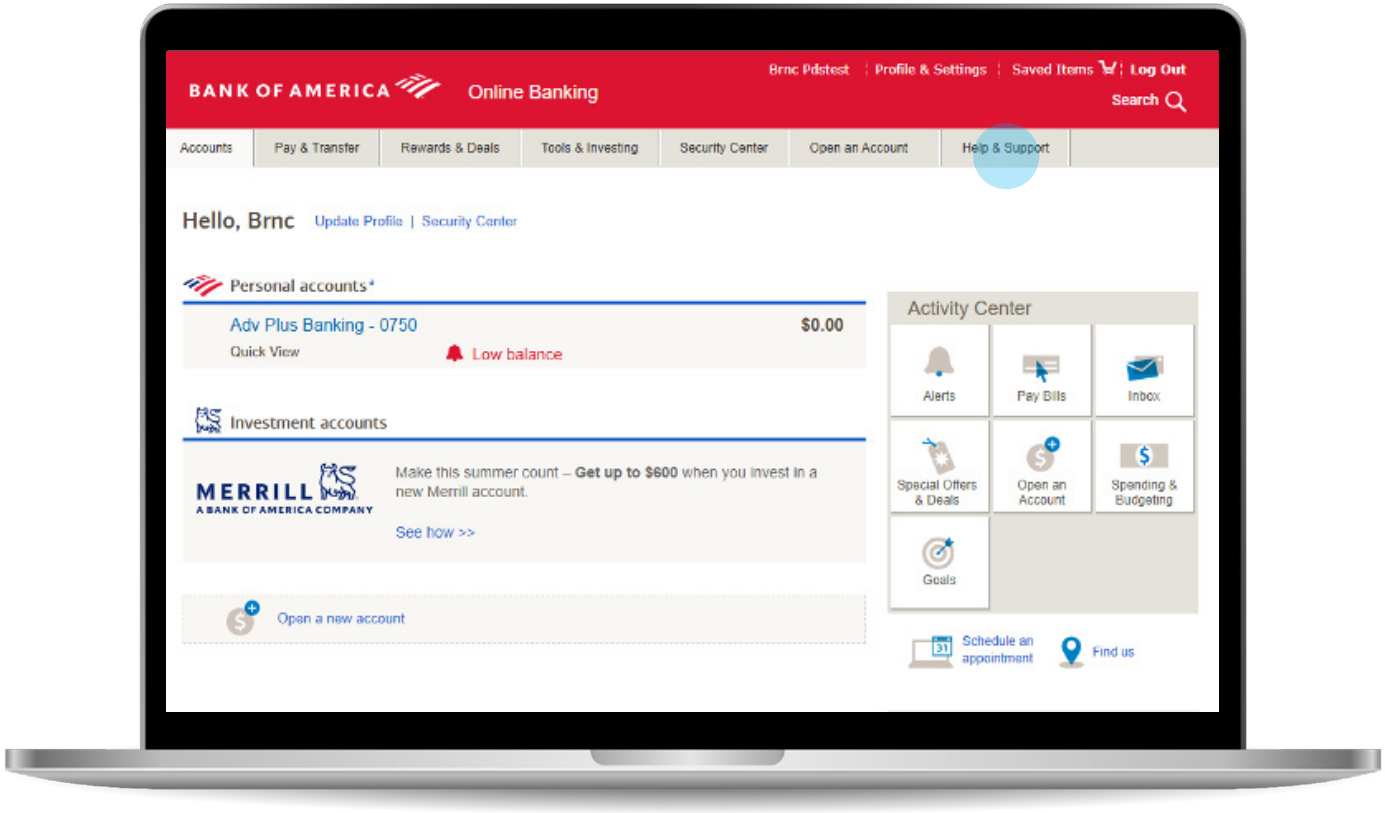


View your Estate Services Case(s)

Step 1

After logging in, click **Help & Support** on the toolbar.

Important note: Estate Services Online is accessible only via a web browser (desktop or mobile). It is not available through the Mobile Banking app.



View your Estate Services Case(s)

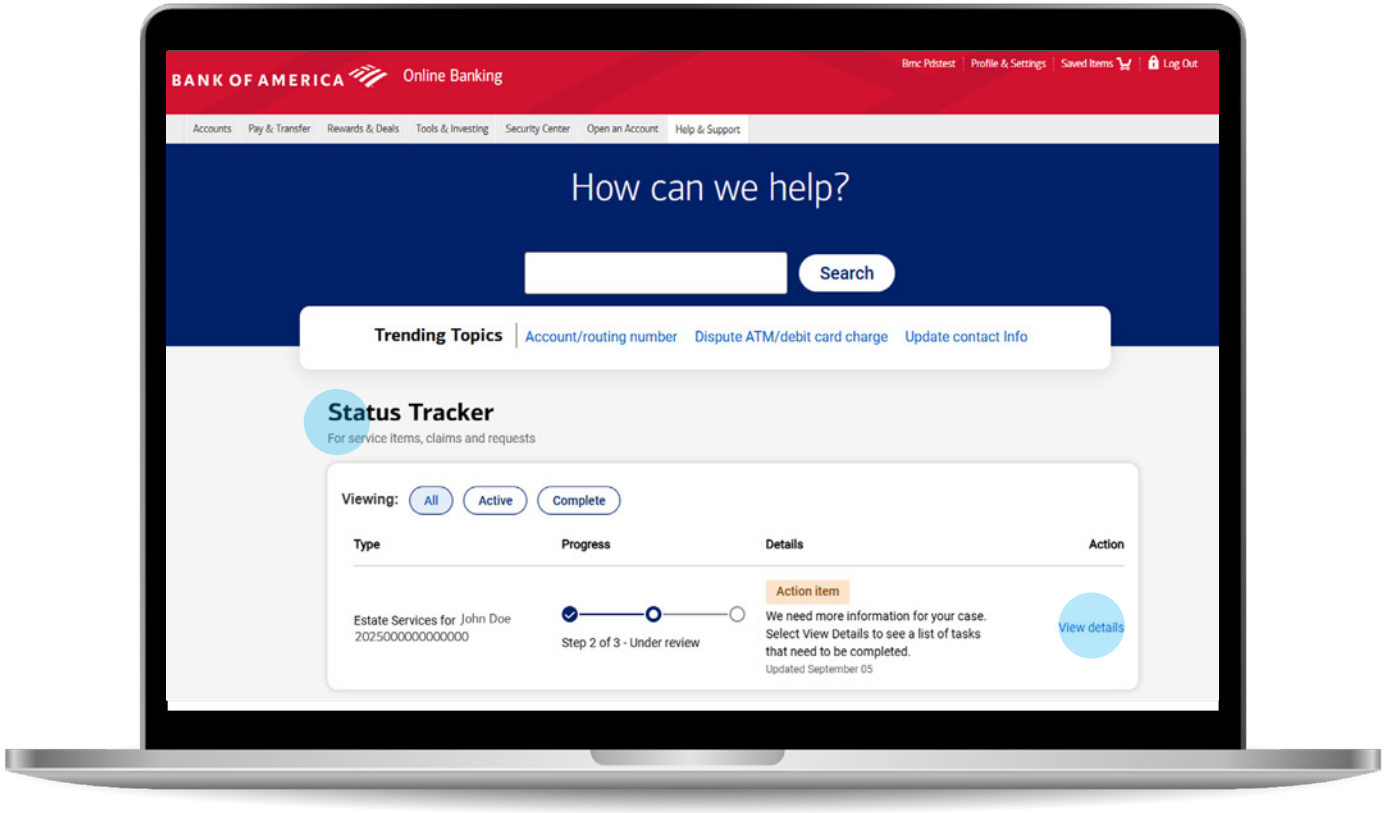
Step 2

Scroll past the How can we help? section and view your Estate Services case(s) under the **Status Tracker**.

Step 3

Click **View details** under **Action** to view the case.

If your case doesn't appear: Call **888.689.4464** to link your case to your Online Banking ID.



Enroll in the Third-Party Portal

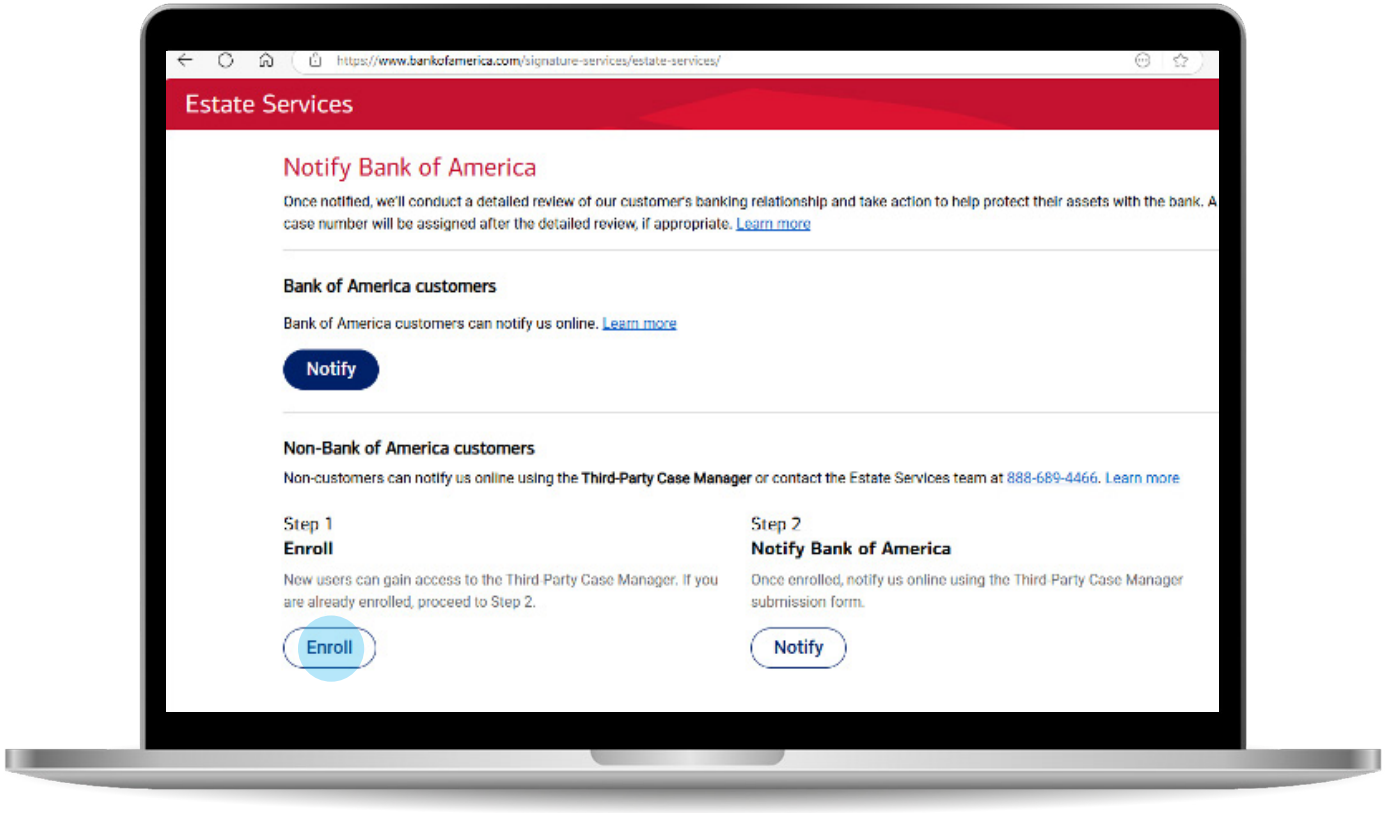
If you are **not** a Bank of America customer, you can enroll in our Authorized Third-Party Portal directly from our website.

Step 1

Visit bankofamerica.com/estateservices on your computer or mobile device.

Step 2

Click **Enroll** under Non-Bank of America customers.



Enroll in the Third-Party Portal

Step 3

Complete all required fields under **Your personal info**.

Step 4

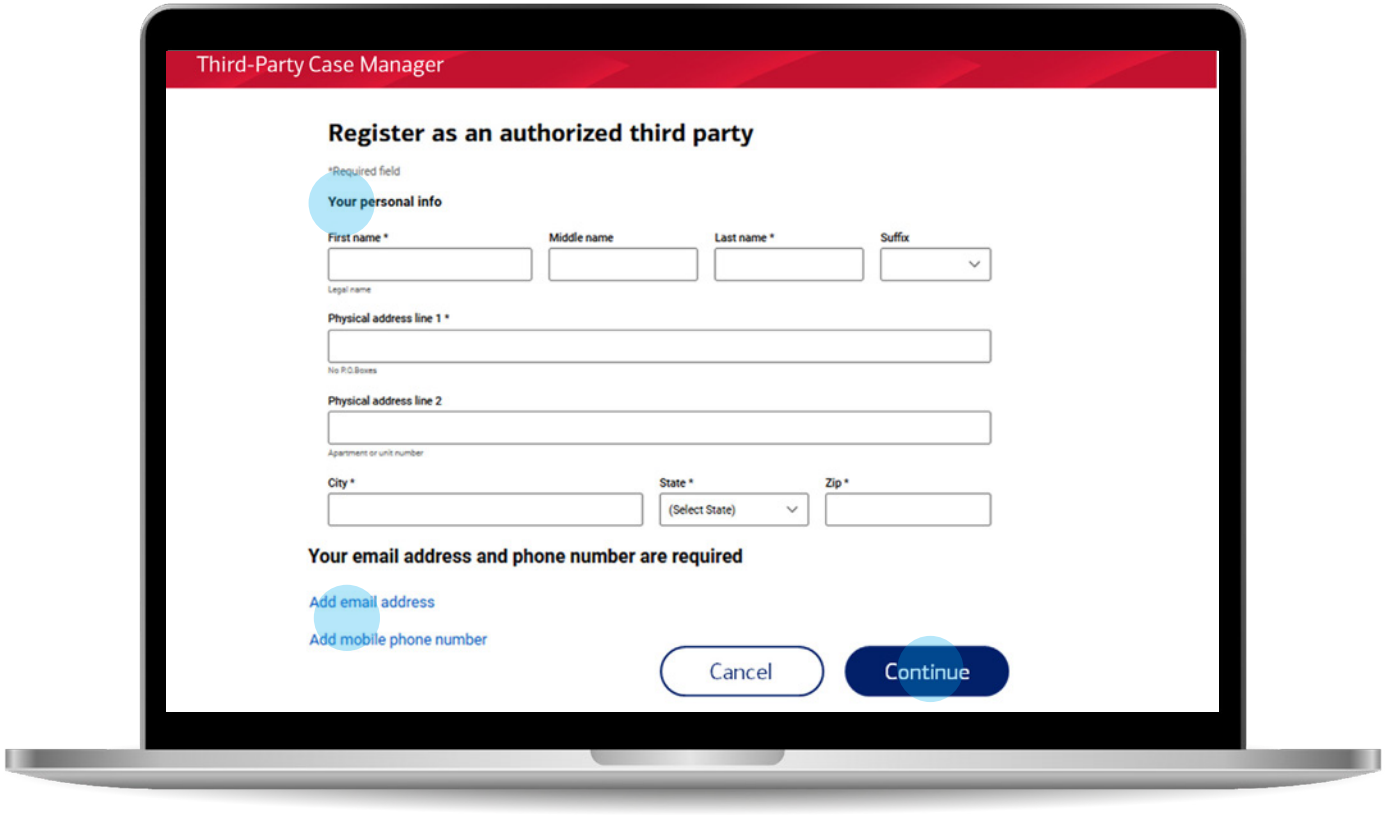
Add your email address and confirm the authentication code.

Step 5

Add your mobile phone number and confirm the authentication code.

Step 6

Click **Continue**.



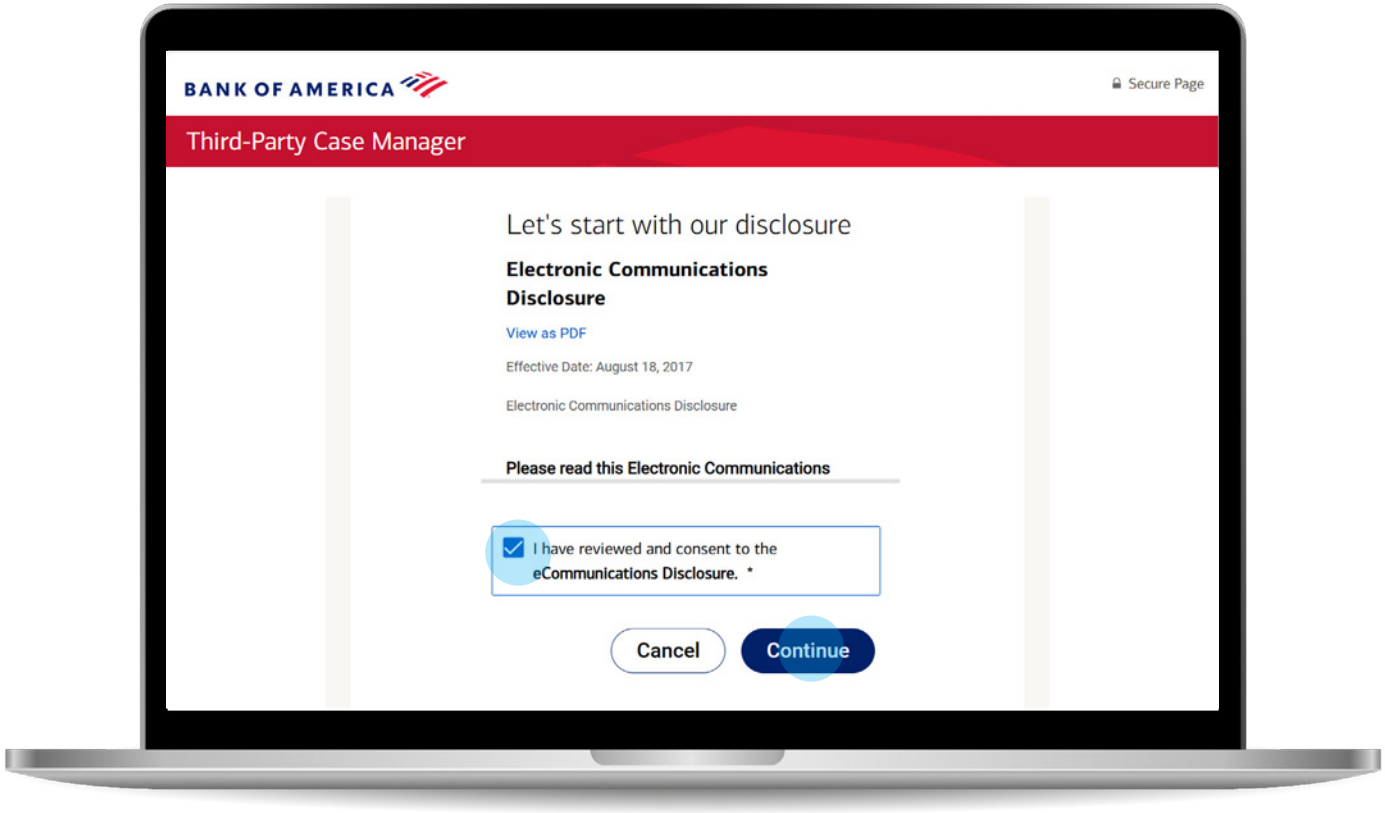
Enroll in the Third-Party Portal

Step 7

Read the **Electronic Communications Disclosure**, check the box that you have reviewed and consent, and click **Continue**.

Step 8

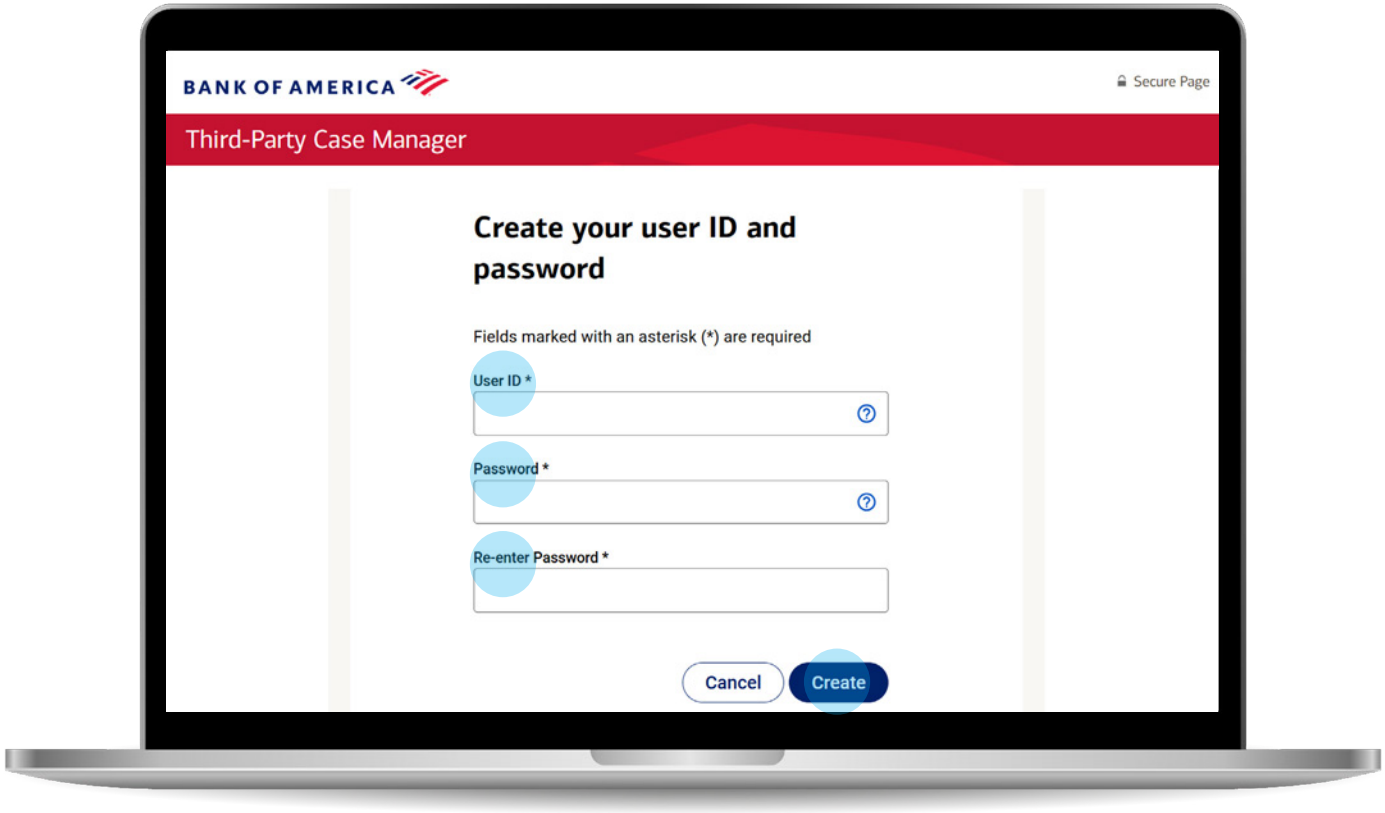
Read the **Online Banking Service Agreement**, check the box that you have reviewed and consent, and click **Continue**.



Enroll in the Third-Party Portal

Step 9

Enter your new User ID and Password and click **Create**.



Log in to the Third-Party Case Manager

Step 1

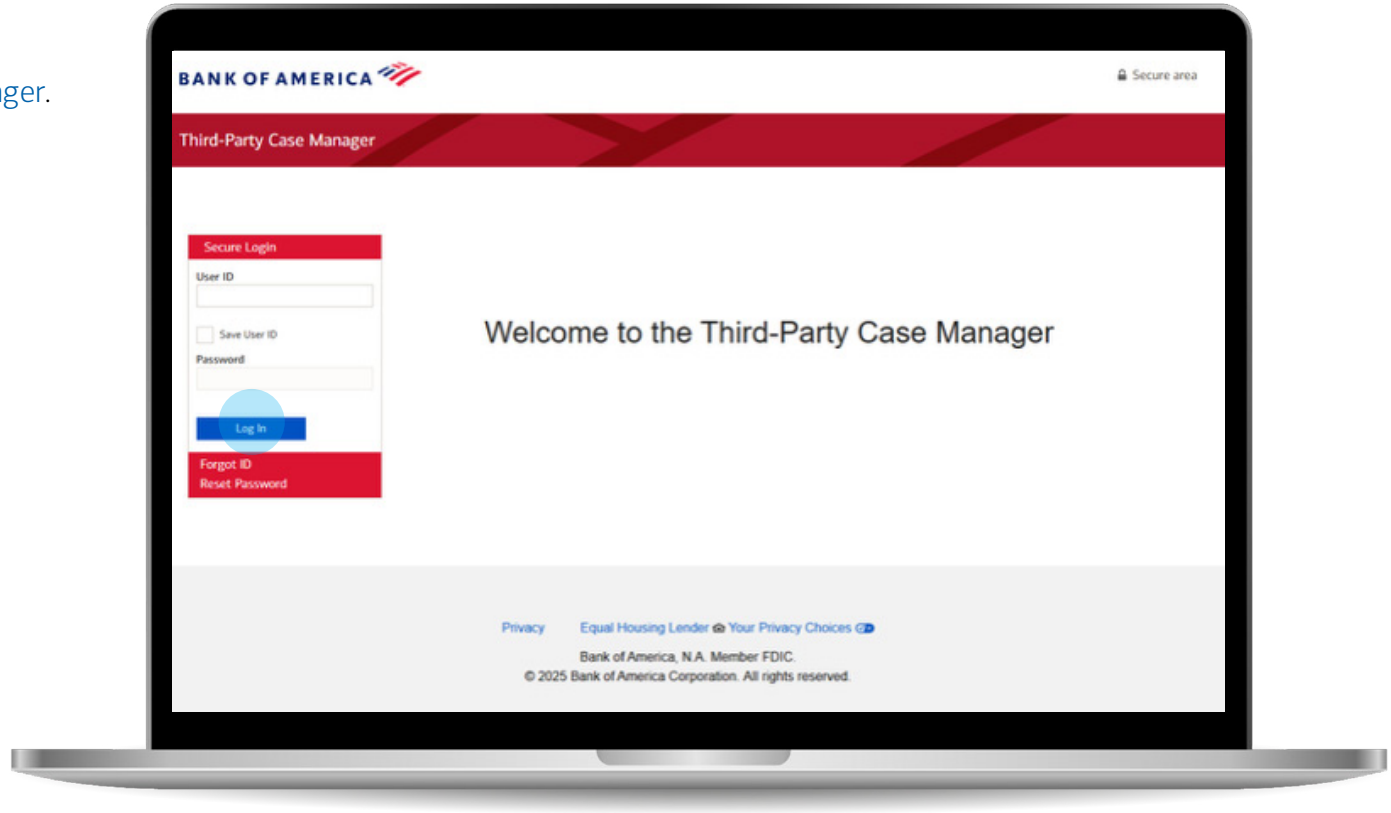
Once enrolled, go to the Third-Party Case Manager.

Step 2

Enter your User ID and Password.

Step 3

Complete two-factor authentication with your mobile code.



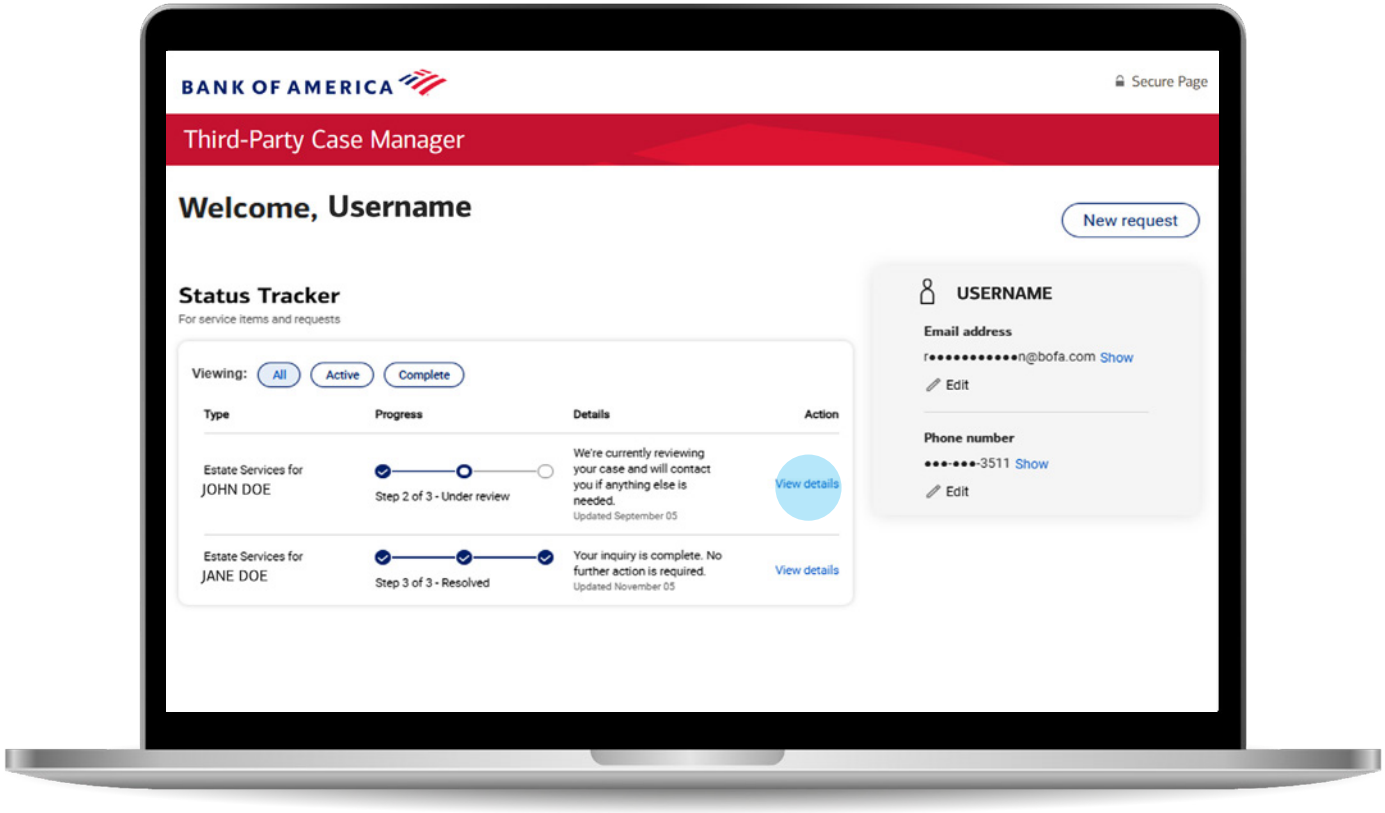
View your Estate Services Case(s)

Step 1

Cases appear under **Status Tracker** on your landing page.

Step 2

Click **View details** on the case you would like to review.



Upload documents

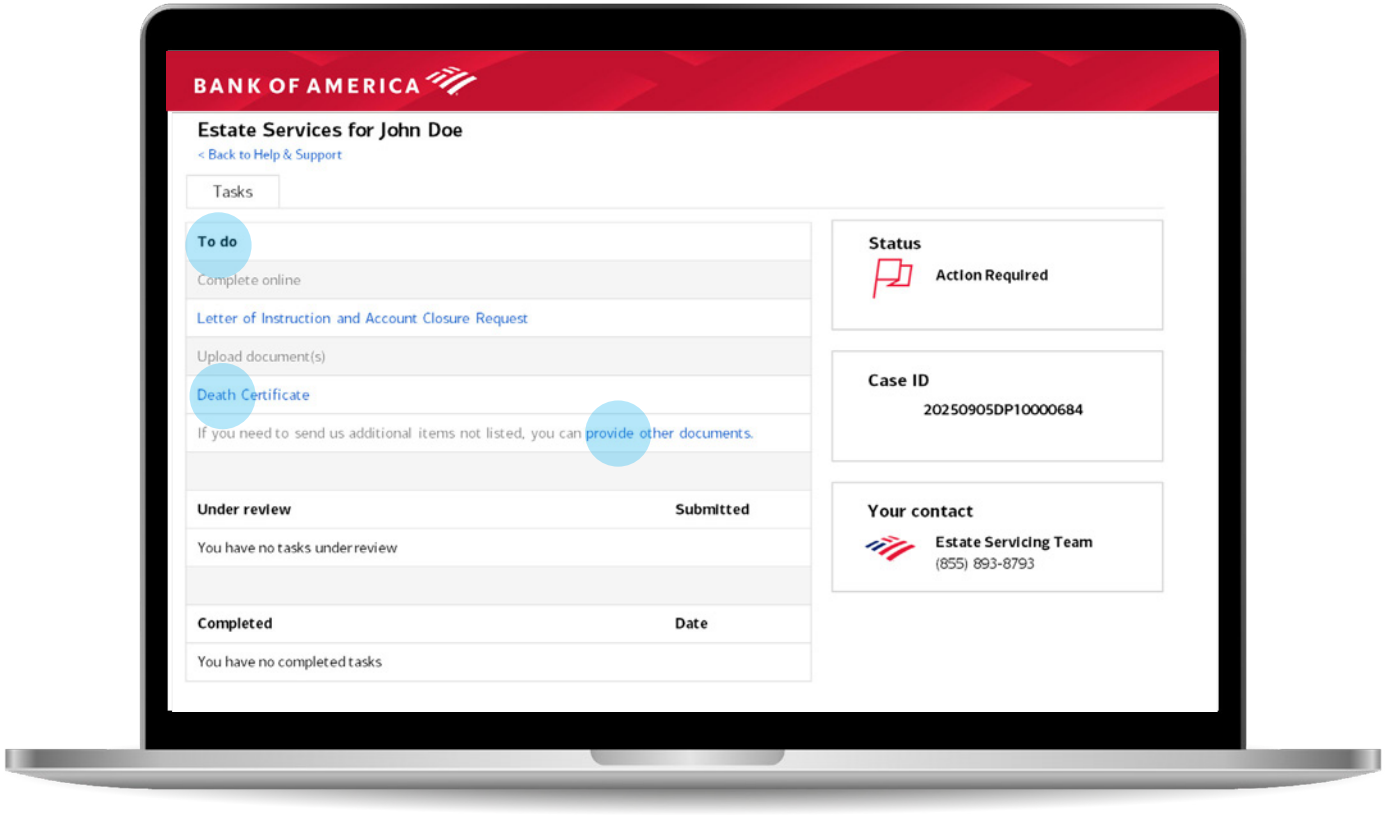
Step 1

Check your **To do** list for required documents.

Step 2

Under **Upload document(s)**, if the document is listed by name (in this case Death Certificate) click on the blue link to upload the requested document.

To submit a document that isn't listed, click on provide other documents to upload.



Upload documents

Step 3

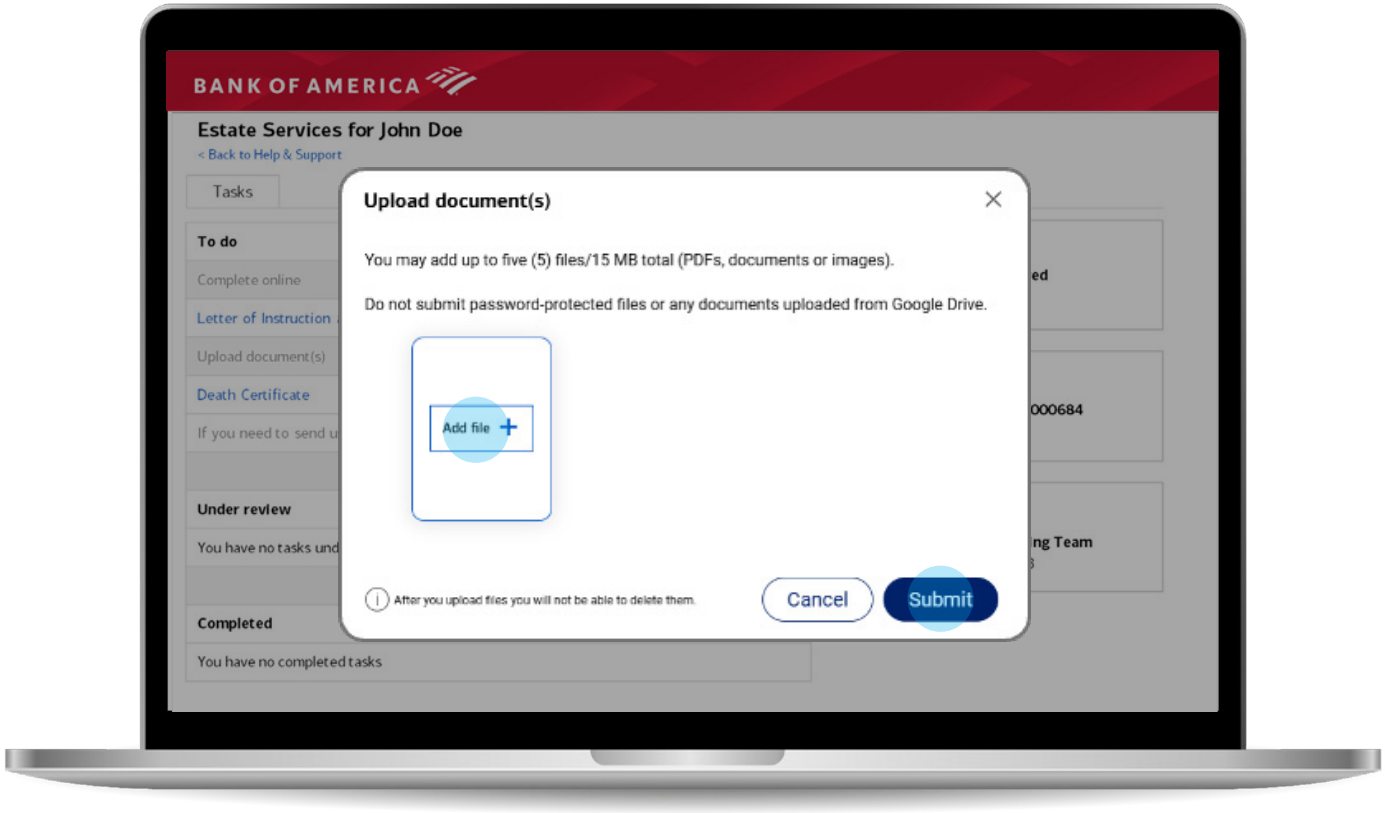
Click **Add file** and select the document from your computer you want to upload.

Step 4

Click **Submit**—a confirmation message will appear.

Step 5

Click **OK** to return to the main screen.

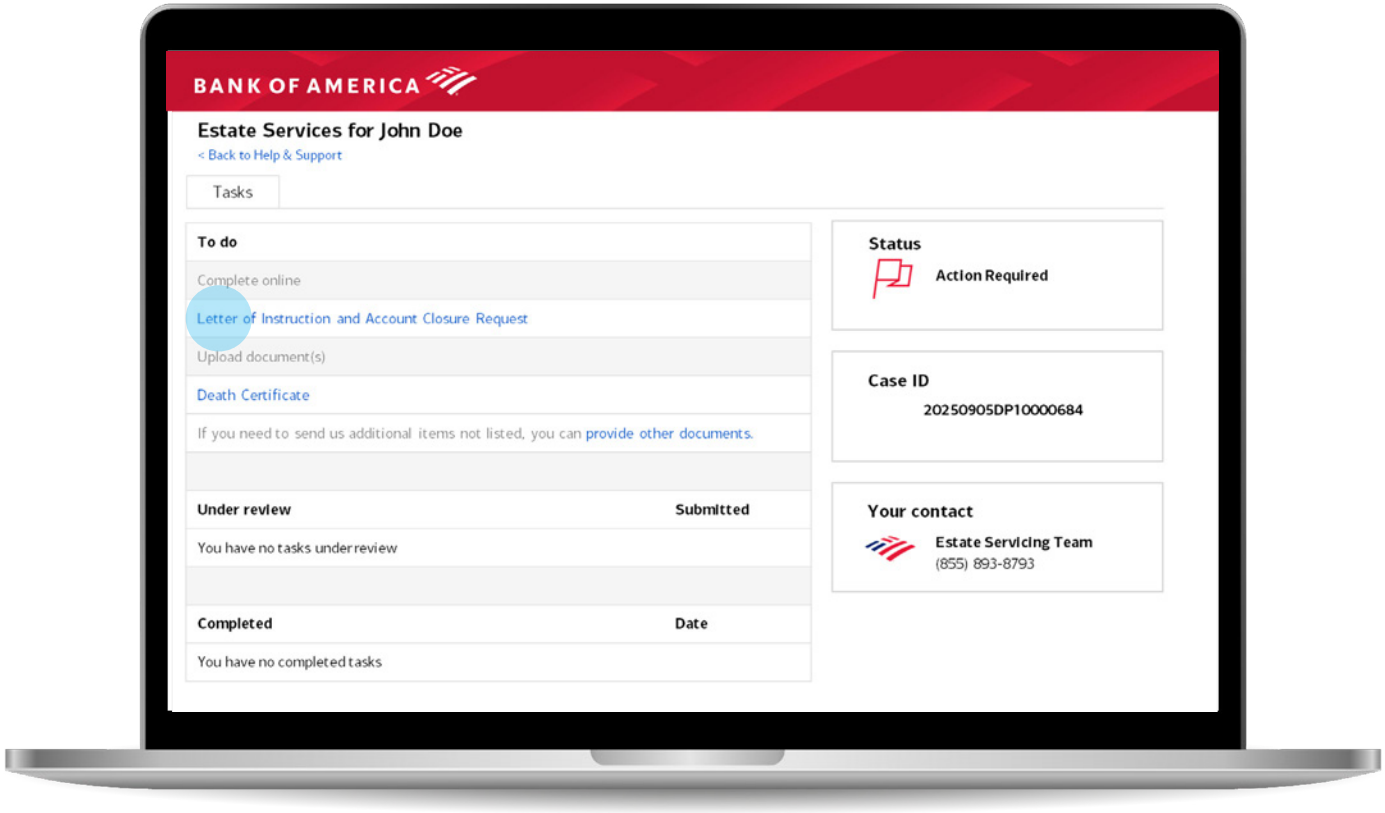


Complete an eForm

Step 1

Required bank forms that are available to complete electronically will show under the **To Do** list in the **Complete online** section.

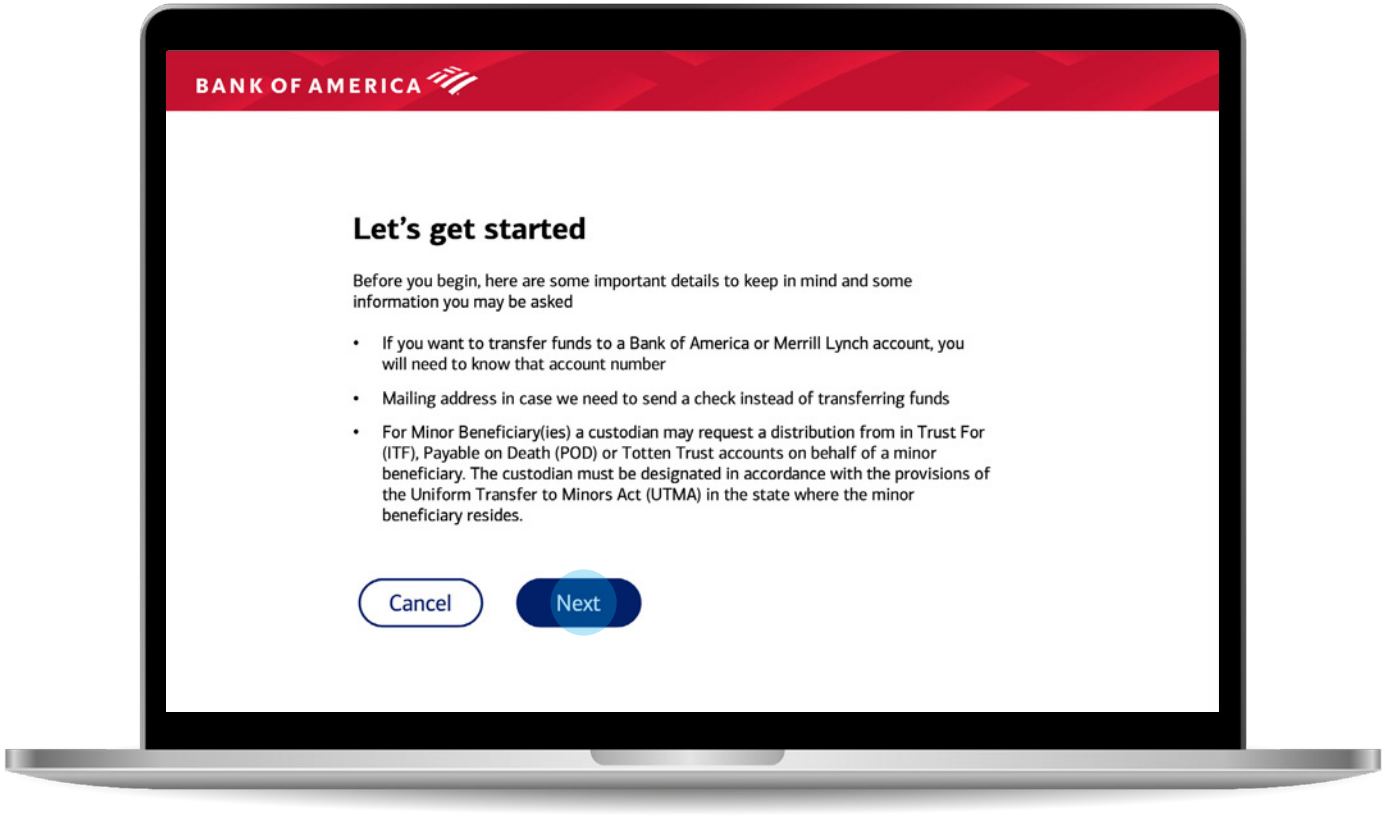
Click the **blue form link**, in this example, the Letter of Instruction and Account Closure Request, to start the form.



Complete an eForm

Step 2

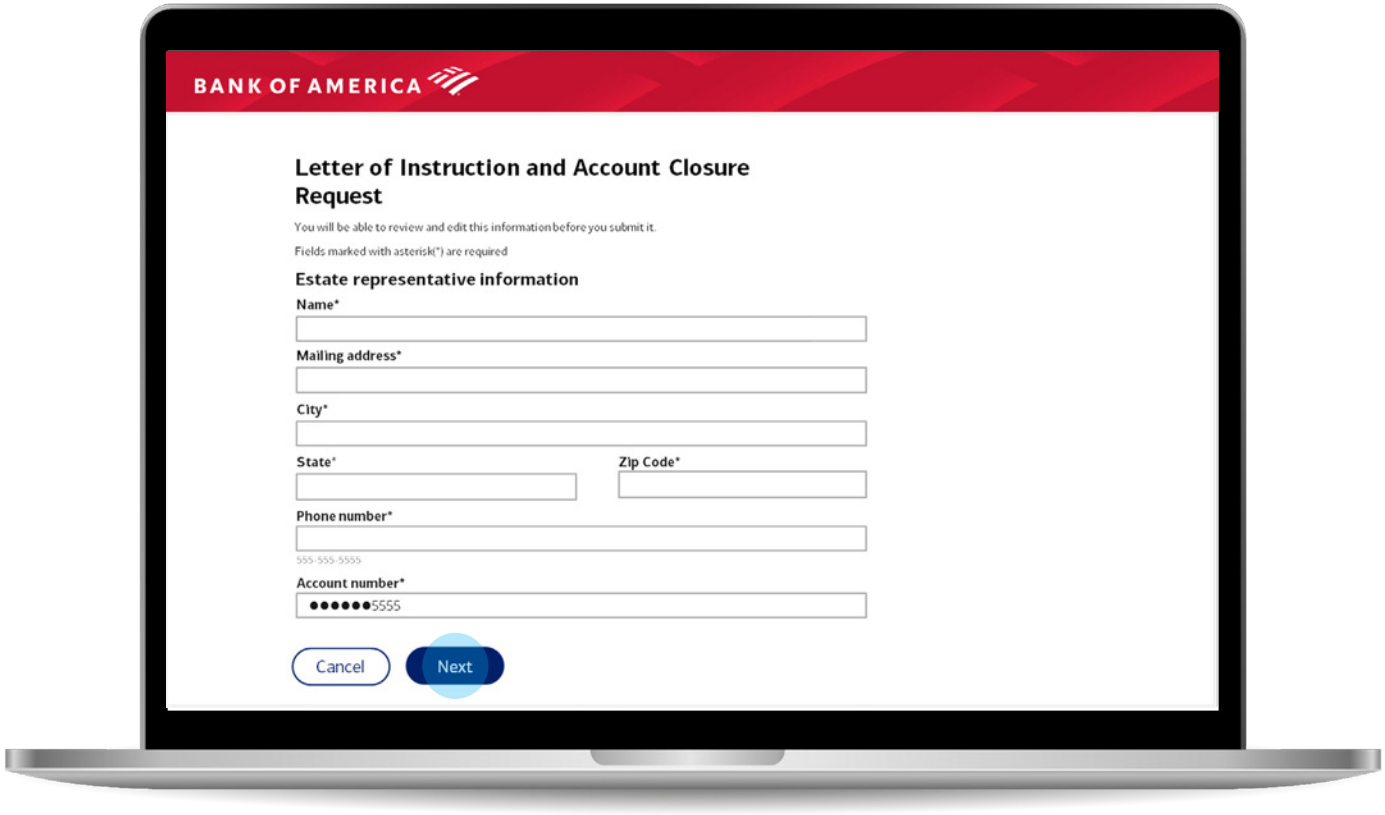
Read the **Let's get started** introduction and click **Next**.



Complete an eForm

Step 3

Fill out all required fields and click **Next**.



Complete an eForm

Step 4

Review the information you entered for accuracy.

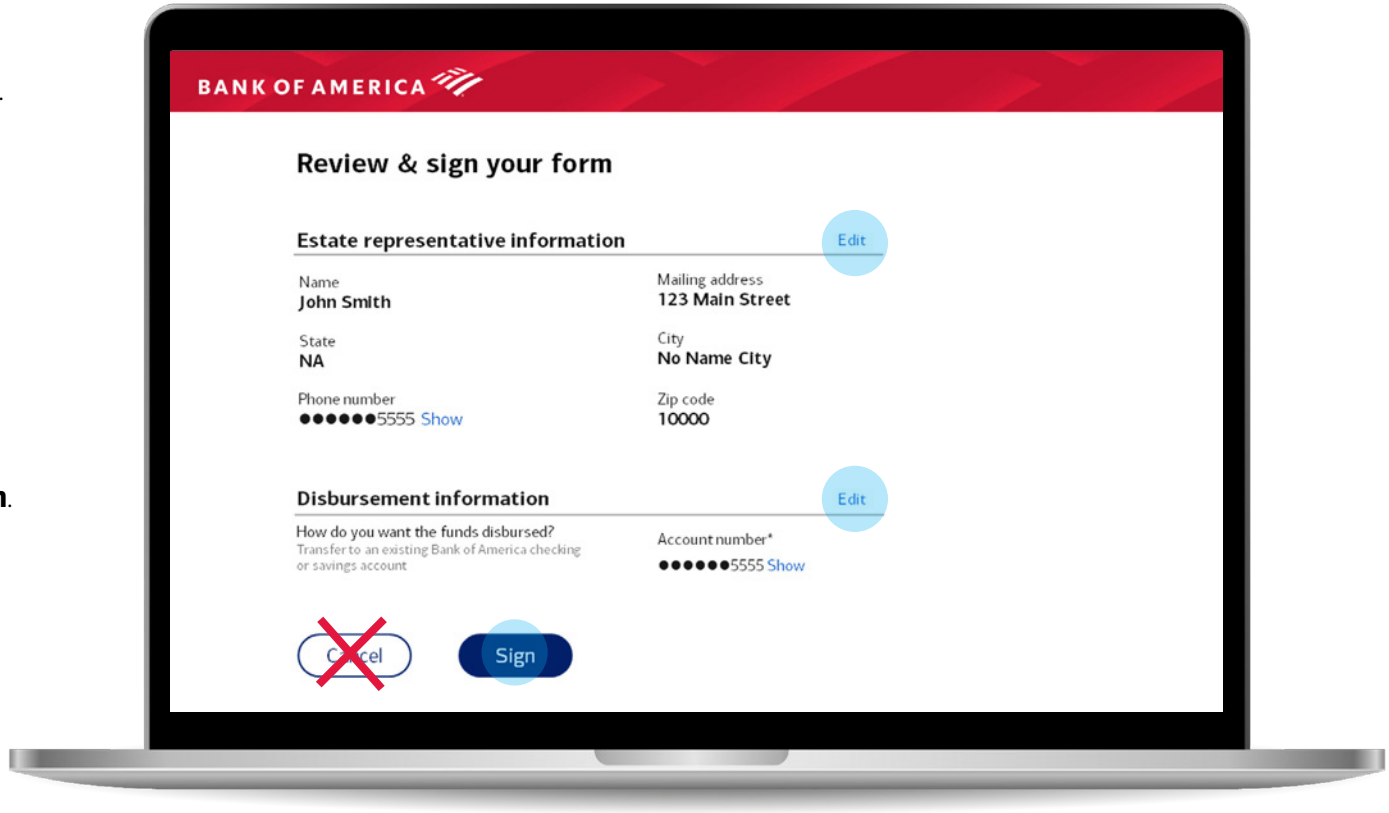
Step 5

To make changes, click **Edit** on the top right of the section requiring edits.

NOTE: To make changes, do not click **Cancel**.

Step 6

Confirm all information is correct and click **Sign**.



Complete an eForm

Step 7

Consent to electronic signature by **checking the box** on the blue toolbar and click **CONTINUE**.

Step 8

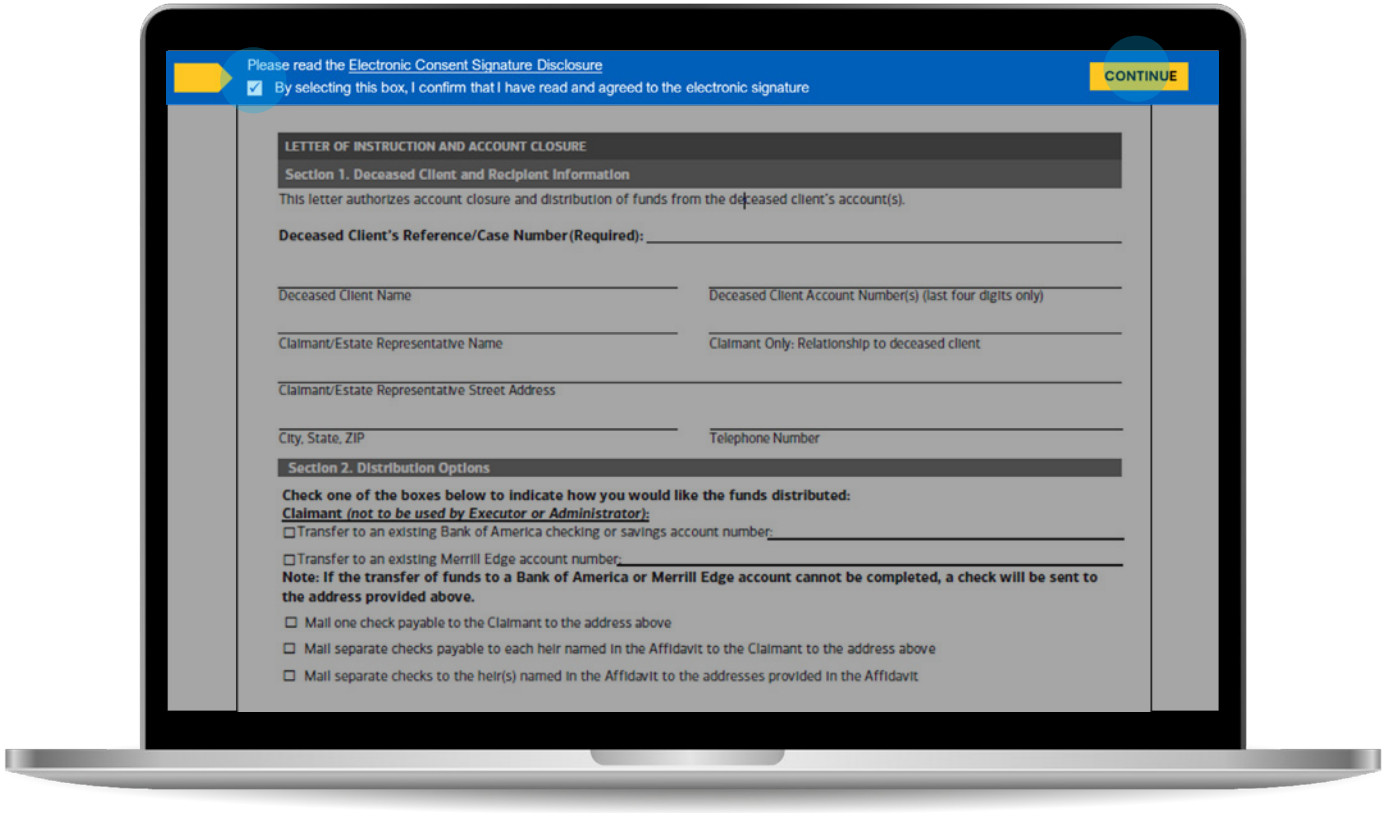
Click **START** to go to digital signature field.

Step 9

Click **Sign** to choose your signature.

Step 10

Click **ADOPT AND SIGN**.



Complete an eForm

Step 11

Return to the main screen and confirm that the form was submitted.

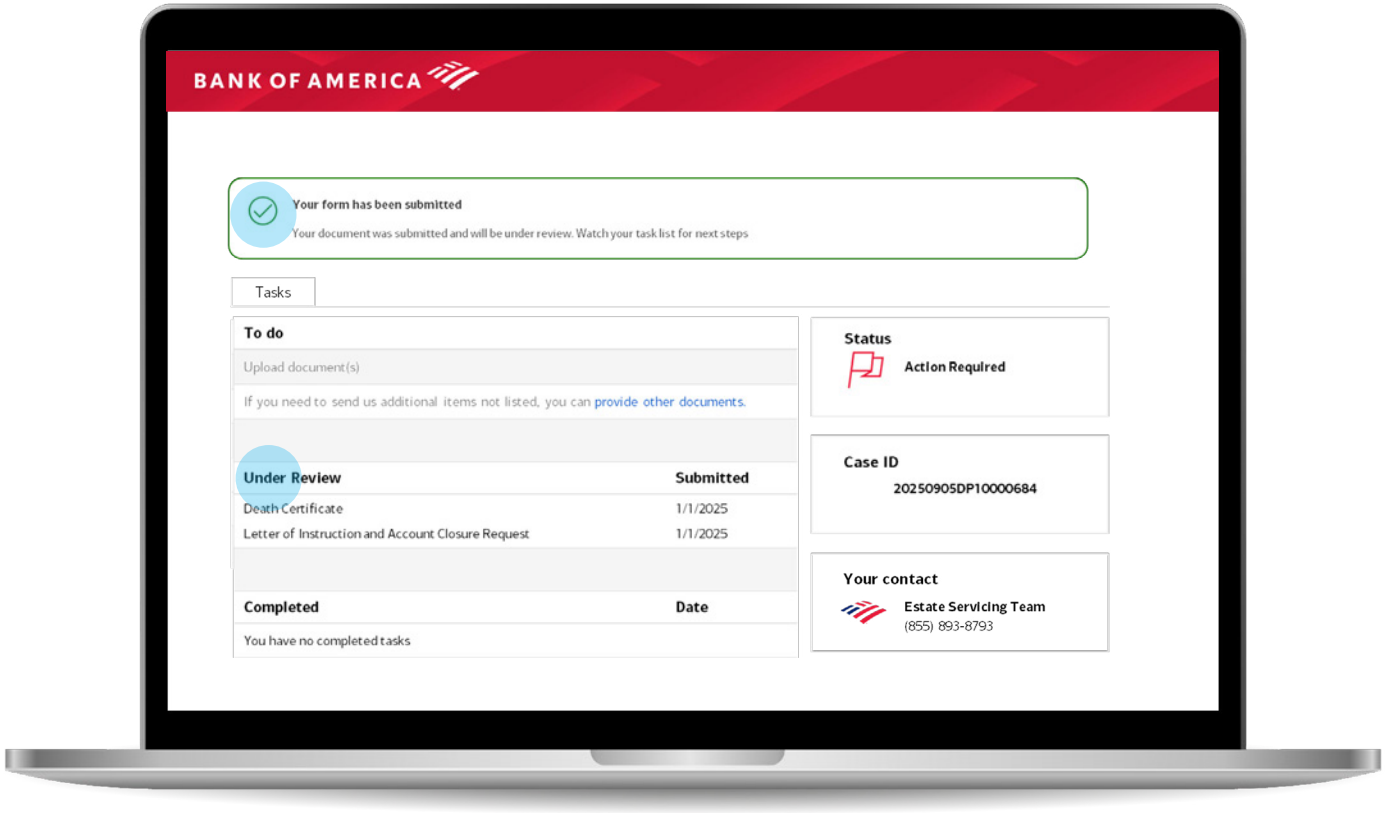
Step 12

Submitted documents will move from the **To do** section to the **Under Review** section.

Step 13

Once your documents have been reviewed and approved, they will appear under **Completed**.

Need help? Call **888.689.4464** for assistance with enrollment, login or case visibility.



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