Using Bank of America Estate Services Online

This step-by-step guide will walk you through the case management tabs and tools available to you online. Our Estate Services team can activate your online capabilities, if not yet active.

Use the online features to:

- View direct contact information for your case
- View case status and access your personal "to do" list of outstanding items needed to finalize your case
- Securely upload required documents to your case

Please note, when you use the online features, you also receive automated email alerts.

Questions?
Call us at **888.689.4466,** Monday through Friday, 9 a.m. – 8 p.m. Eastern, or visit **bankofamerica.com/estateservices**.
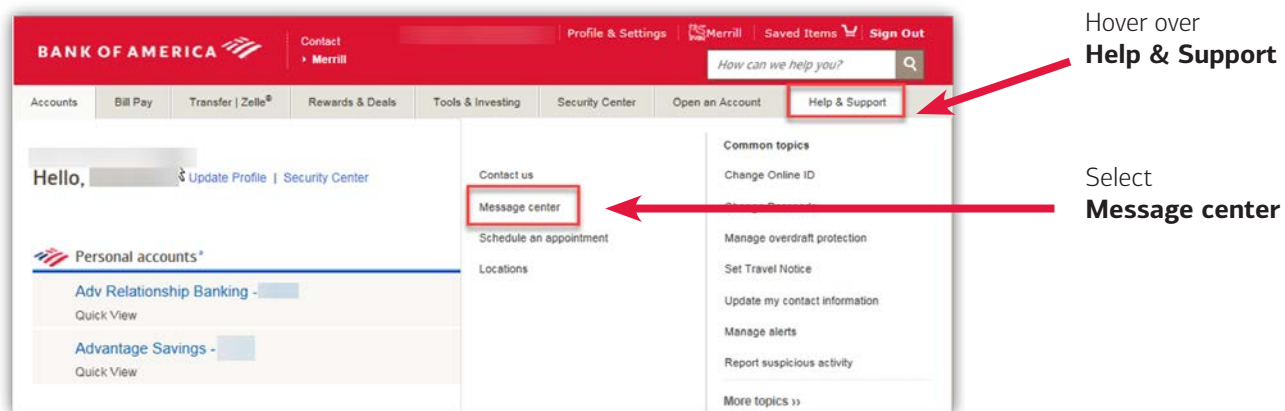
BANK OF AMERICA

1. Getting started

For existing Bank of America customers

Estate Services Online provides secure, real-time case details and information through your Bank of America Online Banking account.

To get started, follow these steps:

1. Log in to Online Banking by entering your standard **User ID**

2. Enter your **password**

3. Hover over **Help & Support**
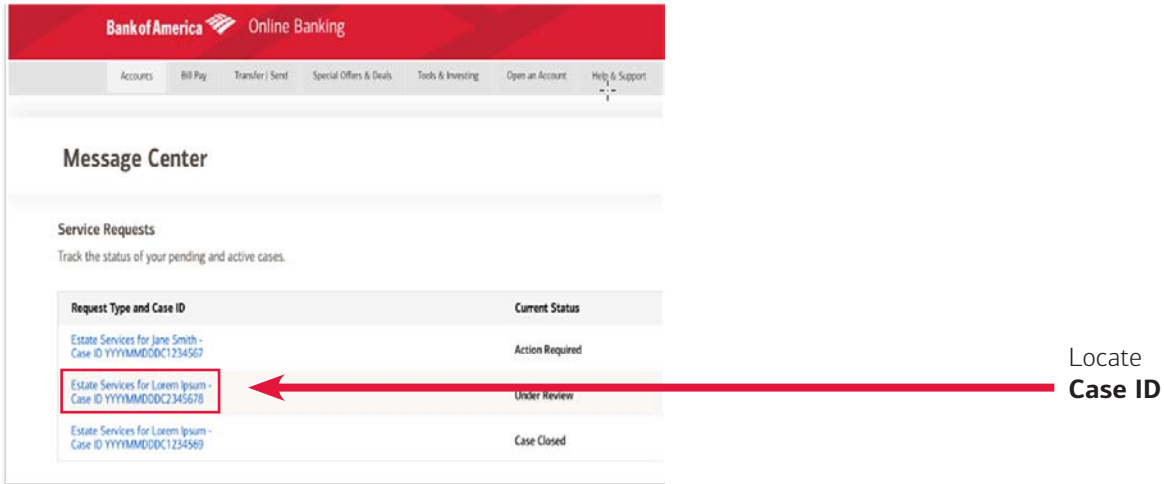
4. Select **Message center**

Hover over
Help & Support

Select
Message center

For non-customers

Authorized third parties and non-customers can be enrolled by contacting Estate Services directly at **888.689.4466**. Once enrolled, follow these steps:

1. Complete the authorization form via a link in an email from Bank of America

2. Respond to the invitation to register online

3. Follow the additional verification steps for security

Add your
Contact information

2. Reviewing your case status

After selecting the **Message center**, under **Service Requests**, select the specific case and **Case ID** that you would like to review.
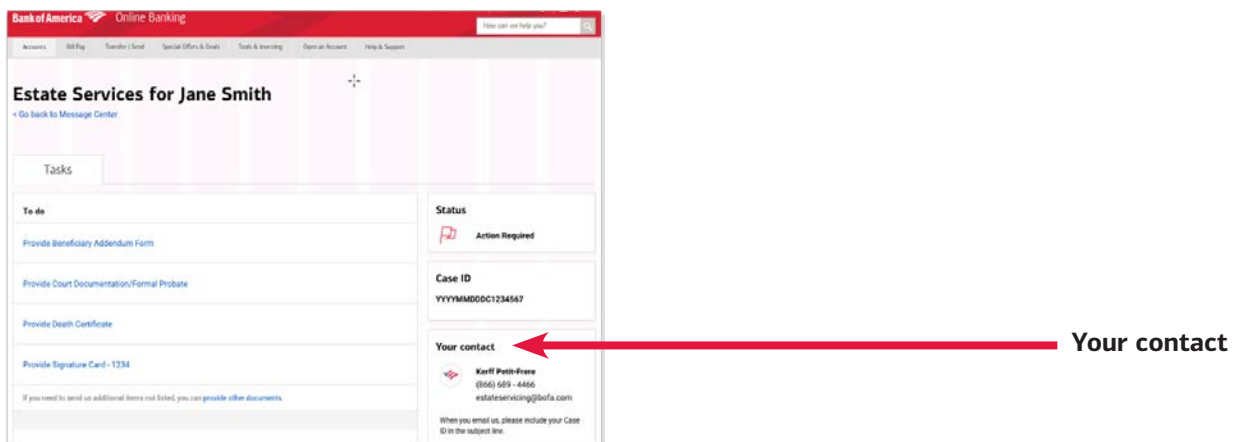
Locate
Case ID

3. Locating case manager information

After selecting the **Case ID**, you can locate general and case manager contact information under **Your contact**.

Your contact

4. Uploading documents and completing eForms

After selecting the **Case ID**, follow these steps to upload or complete any documents:

1. Review **To do** list. Select the hyperlink for the corresponding document you would like to upload or complete.

2. Documents not listed in **To do** list can be uploaded using the **provide other documents** hyperlink.

Required documents
Select the hyperlink for the document

Other documents
provide other documents