



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](https://www.bankofamerica.com/estateservices)**.

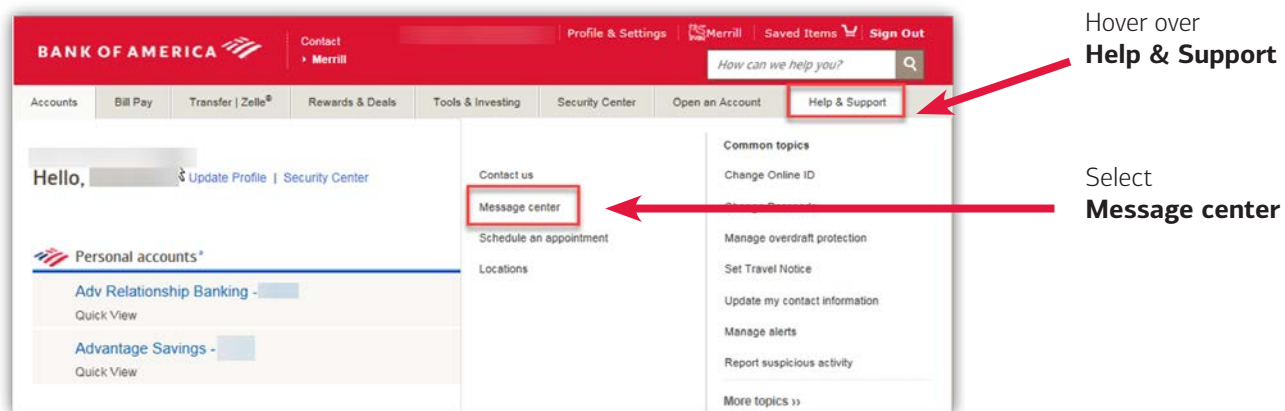
1. Getting started

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**



For non-customers

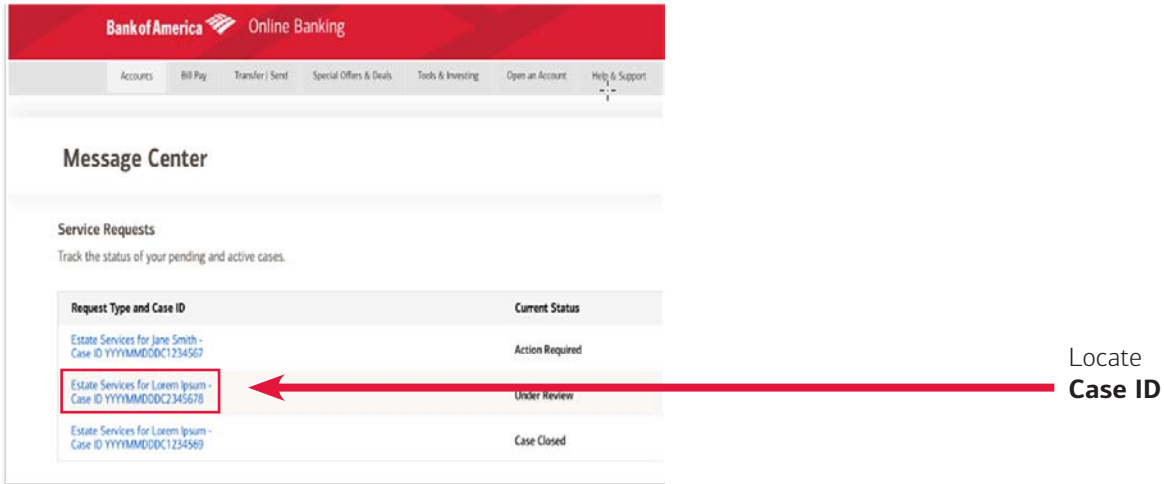
Authorized third parties and non-customers can be enrolled by contacting Estate Services directly at **888.689.4466**. Once enrolled, follow these steps:

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



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.



Bank of America Online Banking

Accounts Bill Pay Transfer | Send Special Offers & Deals Tools & Investing Open an Account Help & Support

Message Center

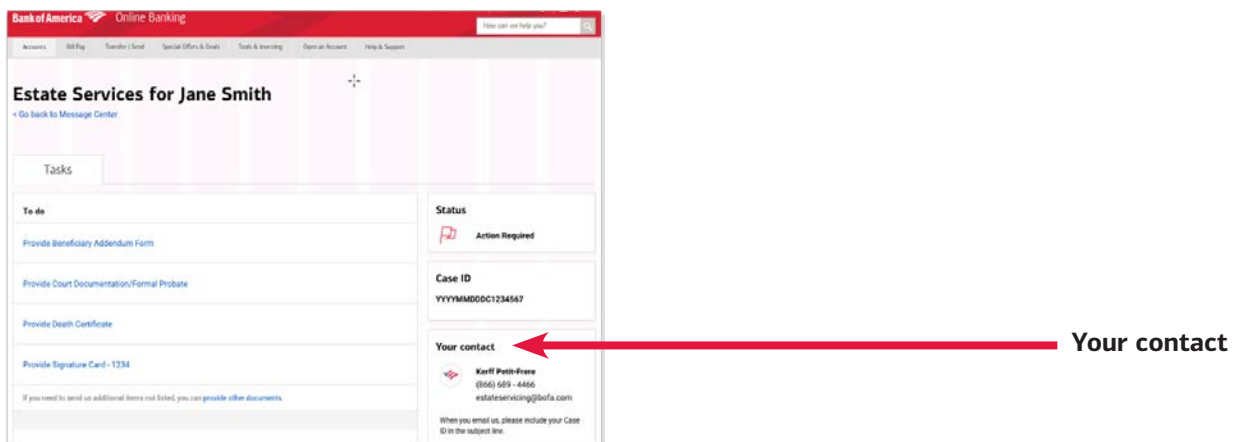
Service Requests
Track the status of your pending and active cases.

Request Type and Case ID	Current Status
Estate Services for Jane Smith - Case ID YYYYMMDDDC1234567	Action Required
Estate Services for Lorem Ipsum - Case ID YYYYMMDDDC2345678	Under Review
Estate Services for Lorem Ipsum - Case ID YYYYMMDDDC1234569	Case Closed

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**.



Bank of America Online Banking

Estate Services for Jane Smith

Go back to Message Center

Tasks

To do

- Provide Beneficiary Addendum Form
- Provide Court Documentation/Formal Probate
- Provide Death Certificate
- Provide Signature Card - 1234

If you need to send us additional items not listed, you can provide other documents.

Status
Action Required

Case ID
YYYYMMDDDC1234567

Your contact

Kerff Peth-Frame
(866) 689-4466
estateservicing@bafxa.com

When you email us, please include your Case ID in the subject line.

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.

The screenshot shows a web interface titled "Estate Services for Jane Smith" with a navigation link "< Go back to Message Center". The main content is divided into two columns. The left column, under a "Tasks" header, contains a "To do" list with three items: "Provide Beneficiary Addendum Form", "Provide Court Documentation/Formal Probate", and "Provide Death Certificate". Below these is "Provide Signature Card" and a link: "If you need to send us additional items not listed, you can [provide other documents](#)". The right column contains a "Status" section with a red flag icon and the text "Action Required", a "Case ID" section with the value "YYYYMMDDDC1234567", and a "Your contact" section for "Kerff Petit-Frere" with phone number "(866) 689 - 4466" and email "kerffpetitfrere@bofa.com". A note at the bottom of the right column says "When you email us, please include your Case ID in the subject line."

Required documents
Select the hyperlink for the document

Other documents
provide other documents