
From: Cynthia Rodriguez [REDACTED]
Sent: 2/2/2018 11:52:19 AM
To: Bella Klein [REDACTED]
Subject: RE: 2017 Caterpillar Trust - JE As Grantor to DW and LG as Trustees of The 2017 Caterpillar Trust January 3 2017

Hi Bella,

We will need the following information:

2017 Caterpillar Trust:

- Tax ID
- Address
- Date of Incorporation
- Trust Agreement

For Grantor/Trustee/Beneficiaries:

- Name
- Address
- Date of Birth
- Social Security Number
- Employment Information (name of employer, address etc)
- Photo ID

Please confirm which account will fund this new trust. Feel free to reach out if you have any questions. Thanks!

Kind regards,

Cynthia Rodriguez



Cynthia Rodriguez
Assistant Vice President

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From: Bella Klein [mailto:[REDACTED]]
Sent: Friday, February 02, 2018 11:22 AM
To: Cynthia Rodriguez <[REDACTED]>
Subject: Fwd: 2017 Caterpillar Trust - JE As Grantor to DW and LG as Trustees of The 2017 Caterpillar Trust January 3 2017

Cynthia,

Please email a list of all necessary documents required to open a new bank account for The 2017 Caterpillar Trust.