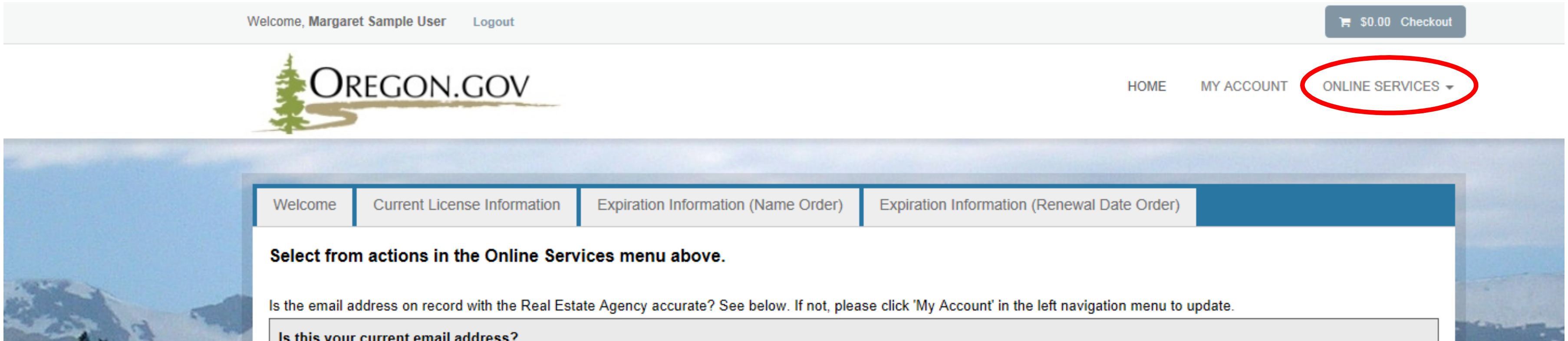
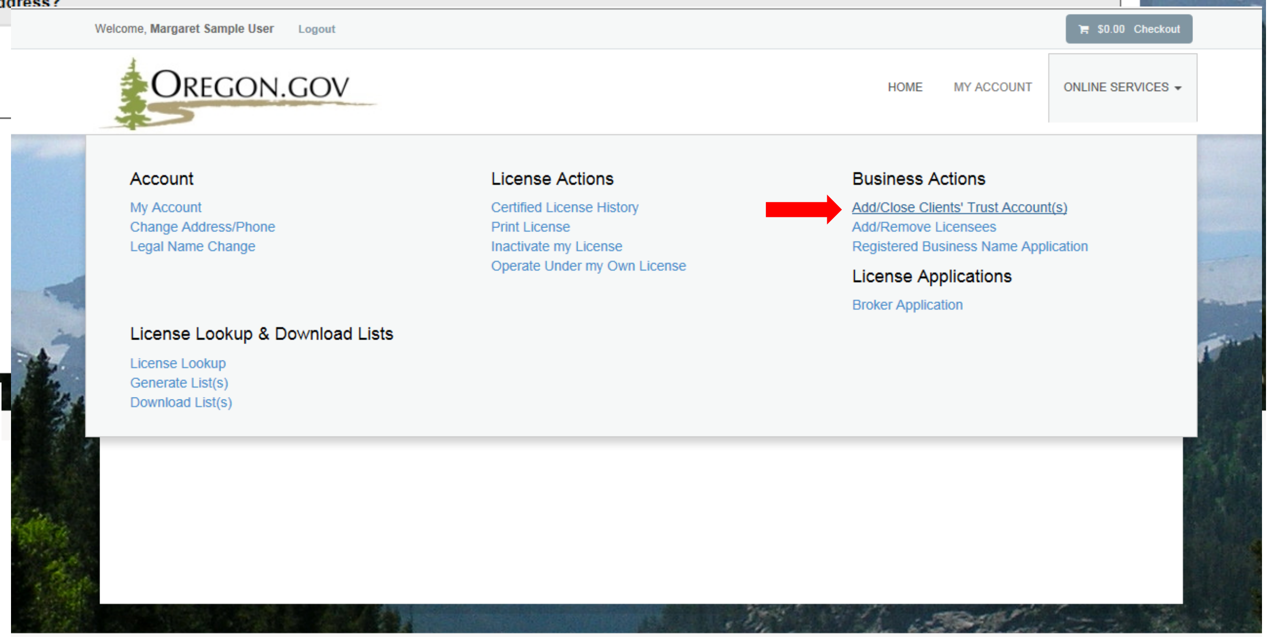
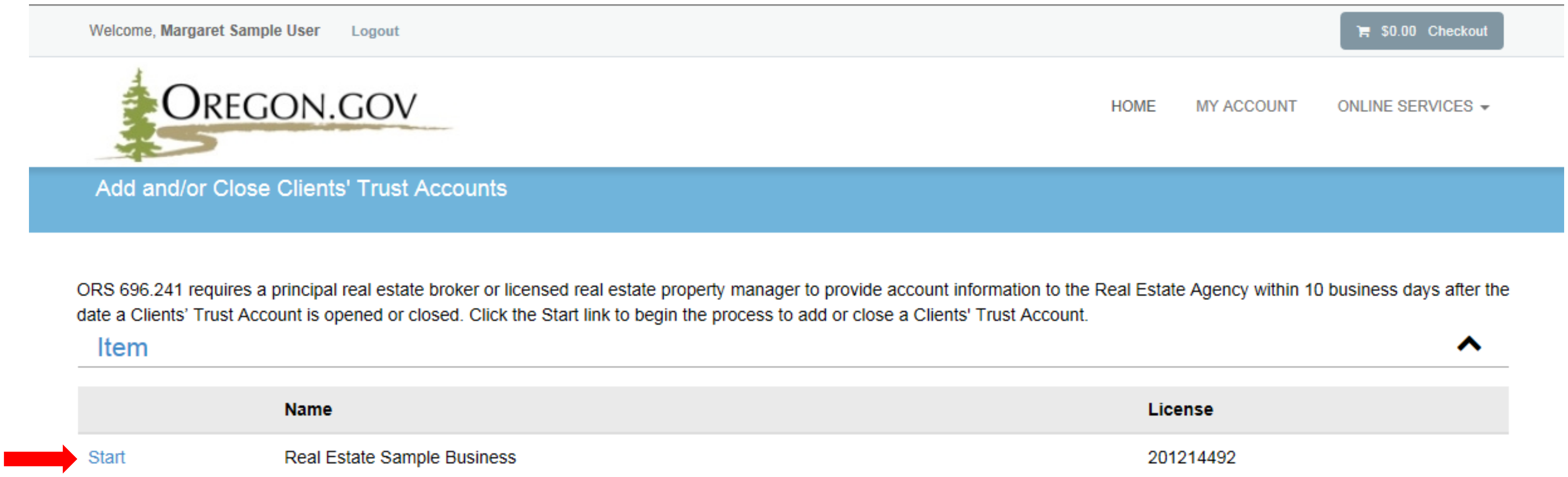
Add & Remove Clients' Trust Accounts

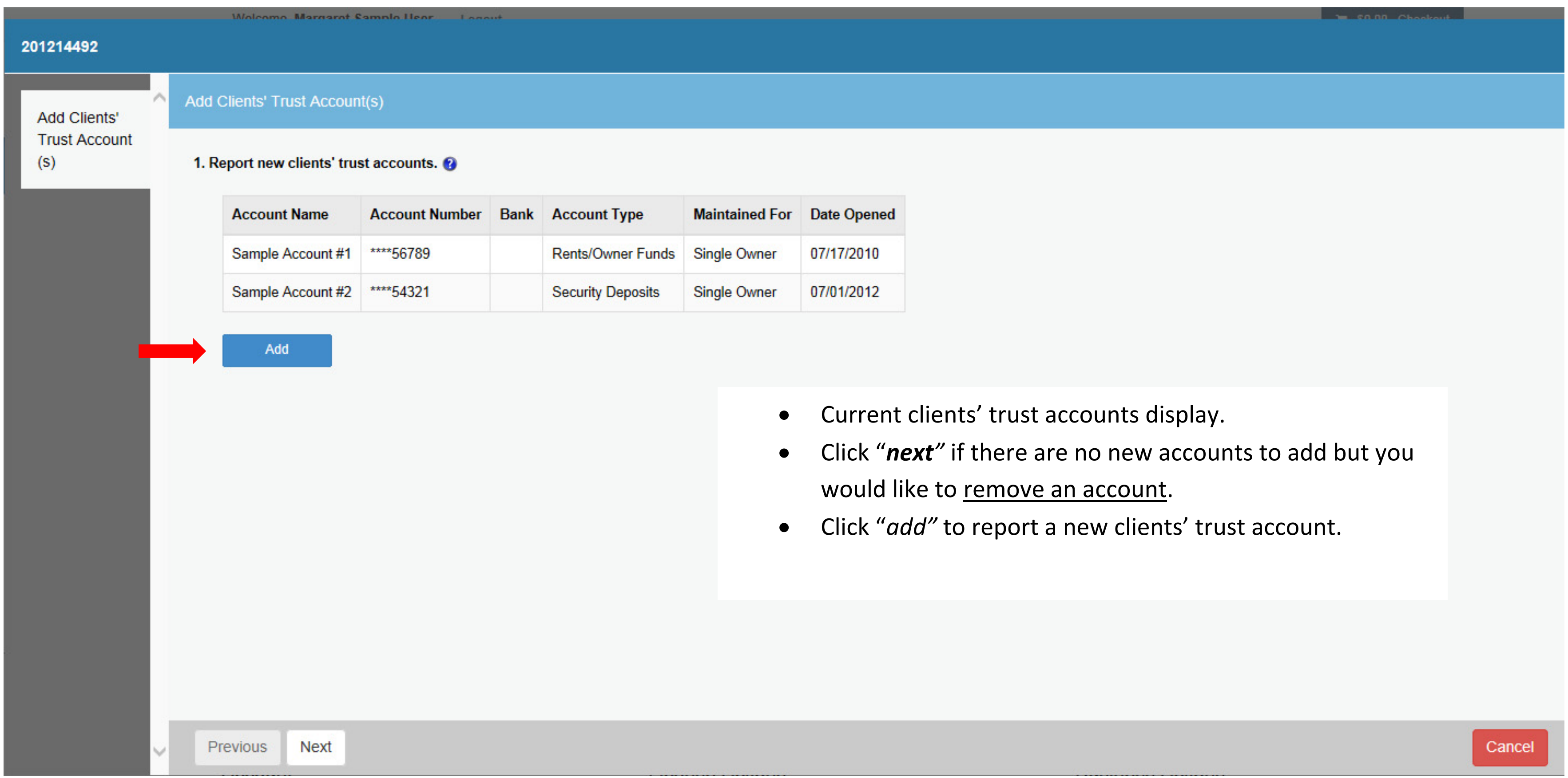




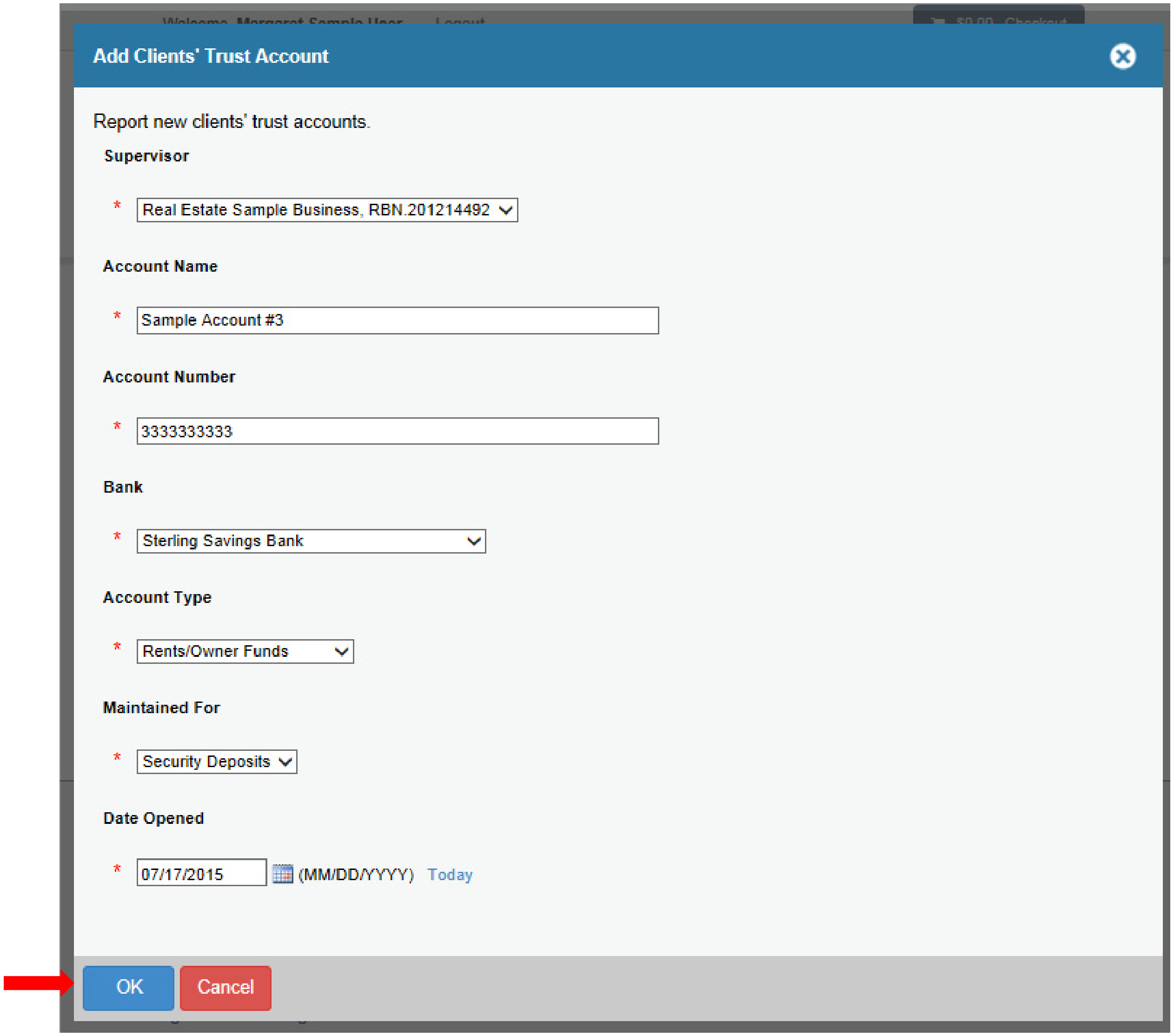
- Click "*Add/Close Clients' Trust Account(s)*" in the "**ONLINE SERVICES**" menu.

- Click *"Start"* to begin the process.

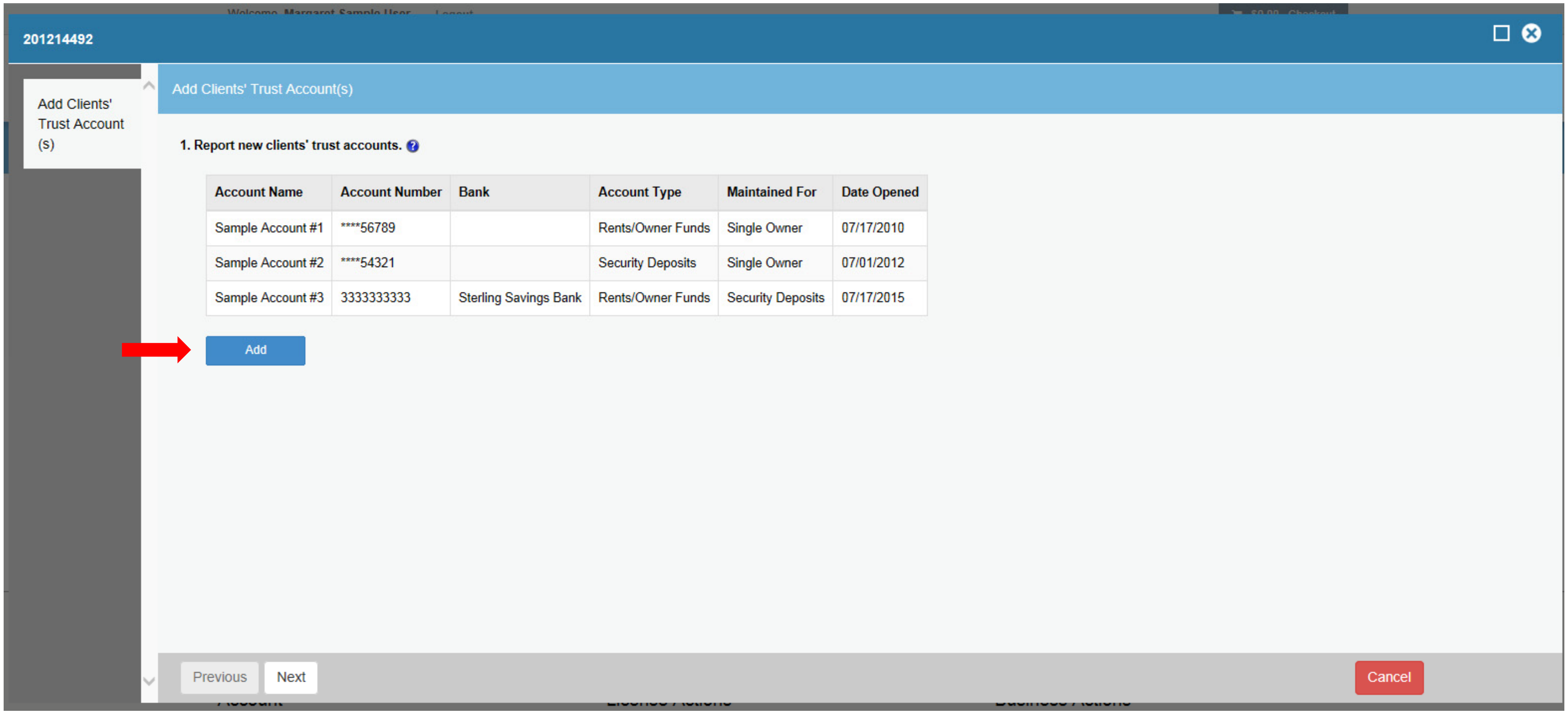




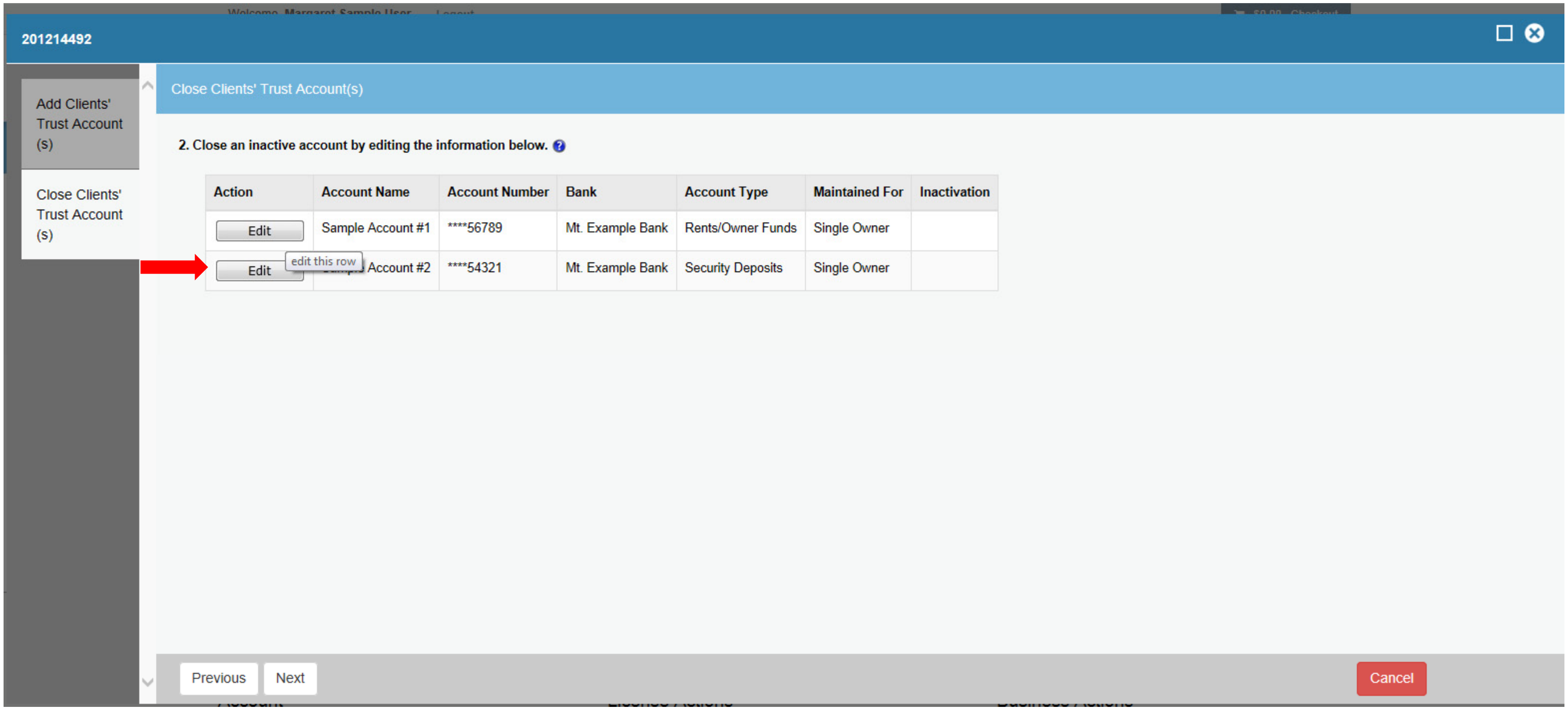
- Current clients' trust accounts display.
- Click *"**next**"* if there are no new accounts to add but you would like to <u>remove an account</u>.
- Click *"add"* to report a new clients' trust account.



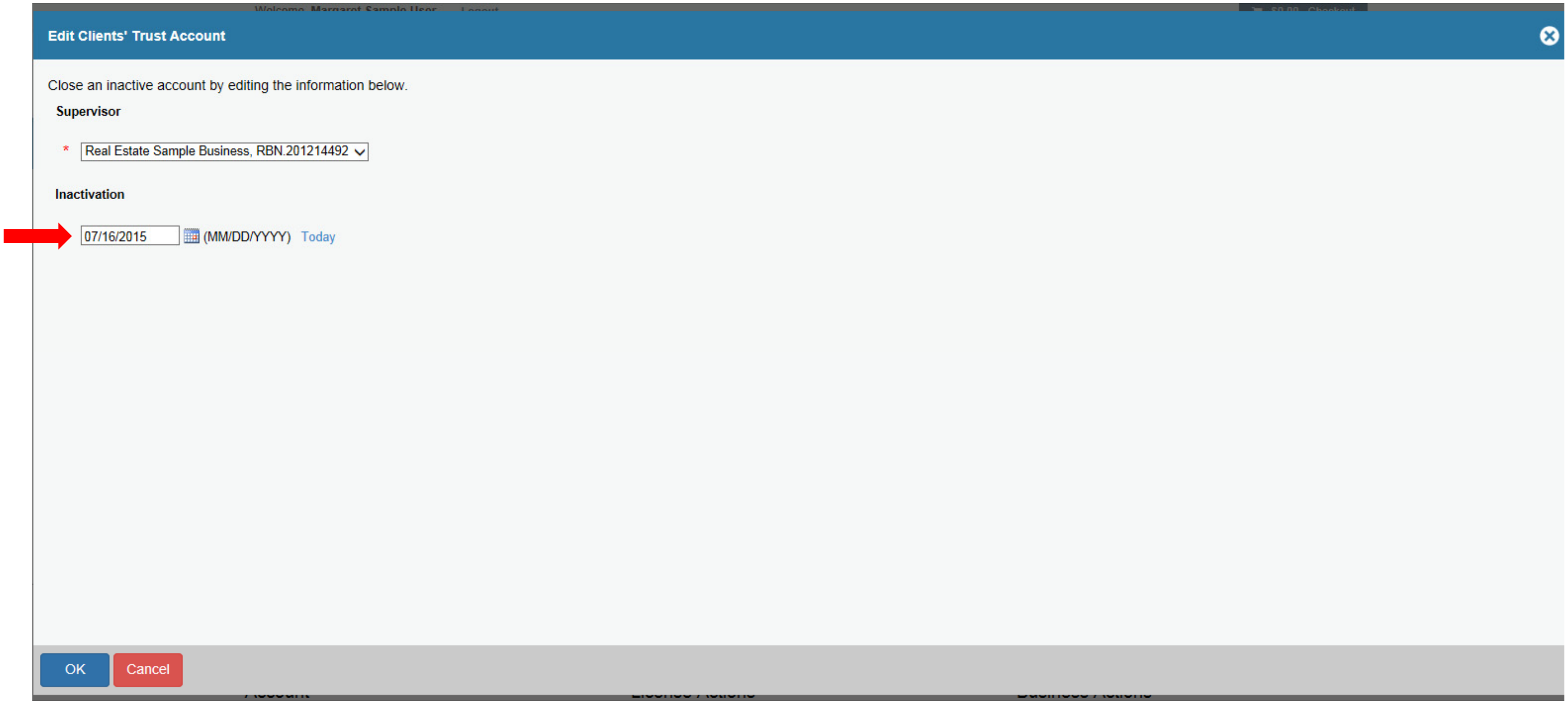
- Click "*OK*" upon completion.



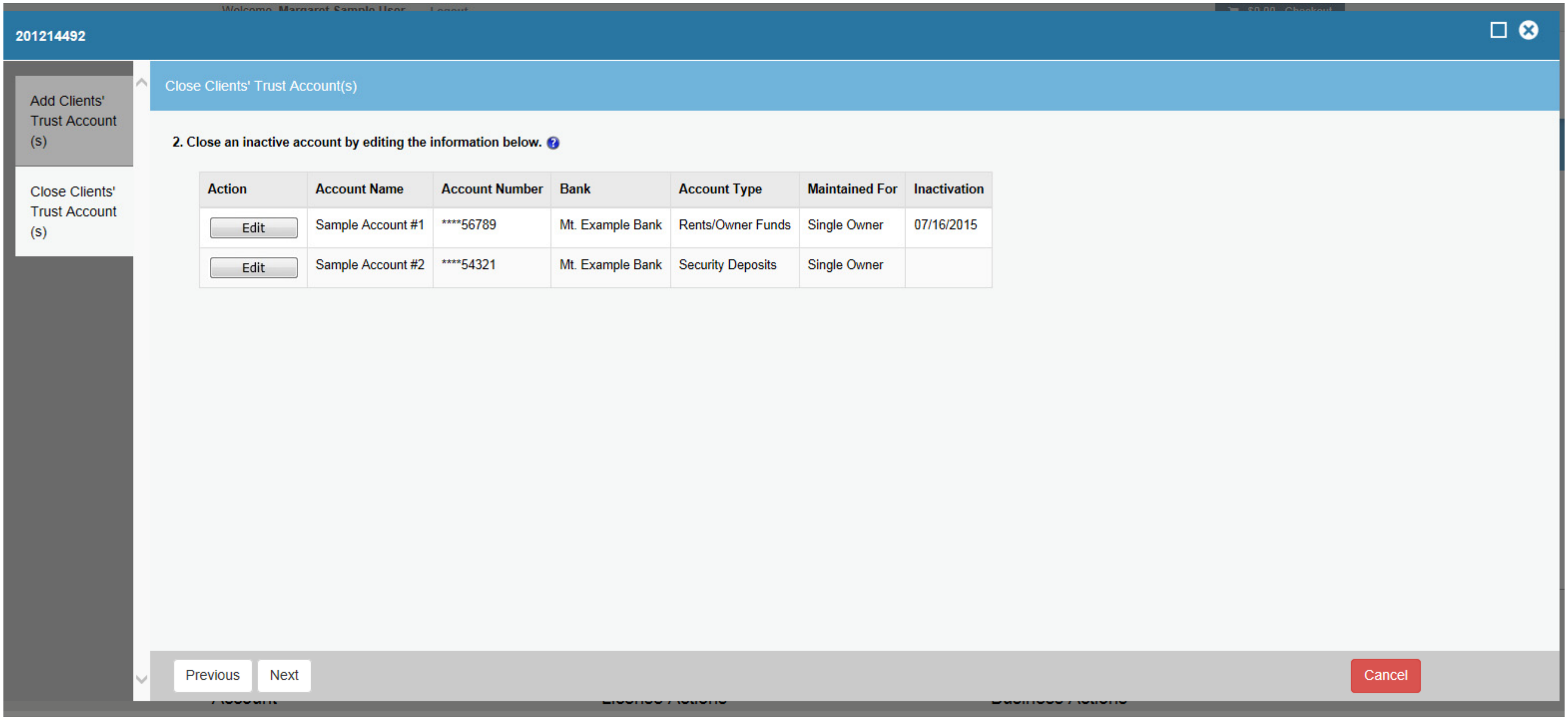
- Click "***add***" to report additional accounts.
- Click ***"next"*** to proceed.



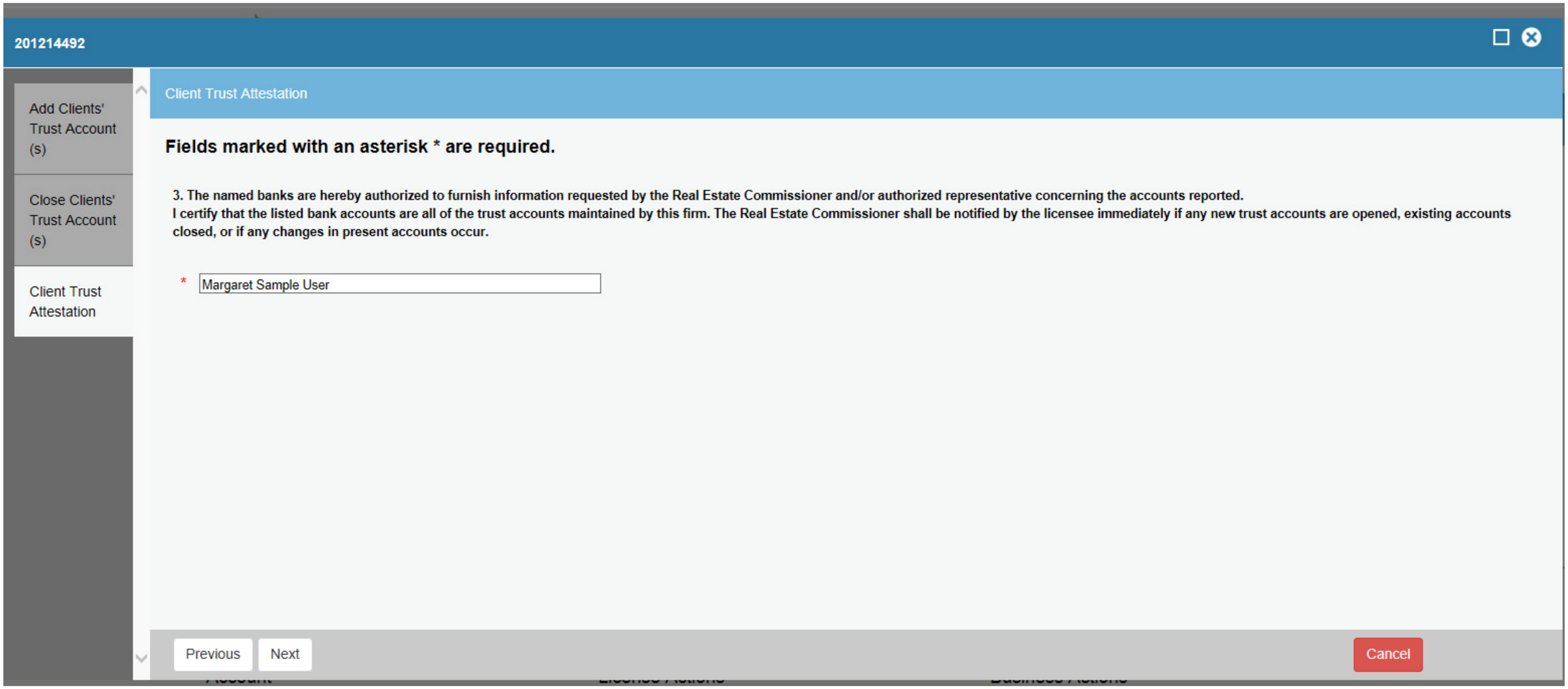
- Click *"edit"* to remove an account



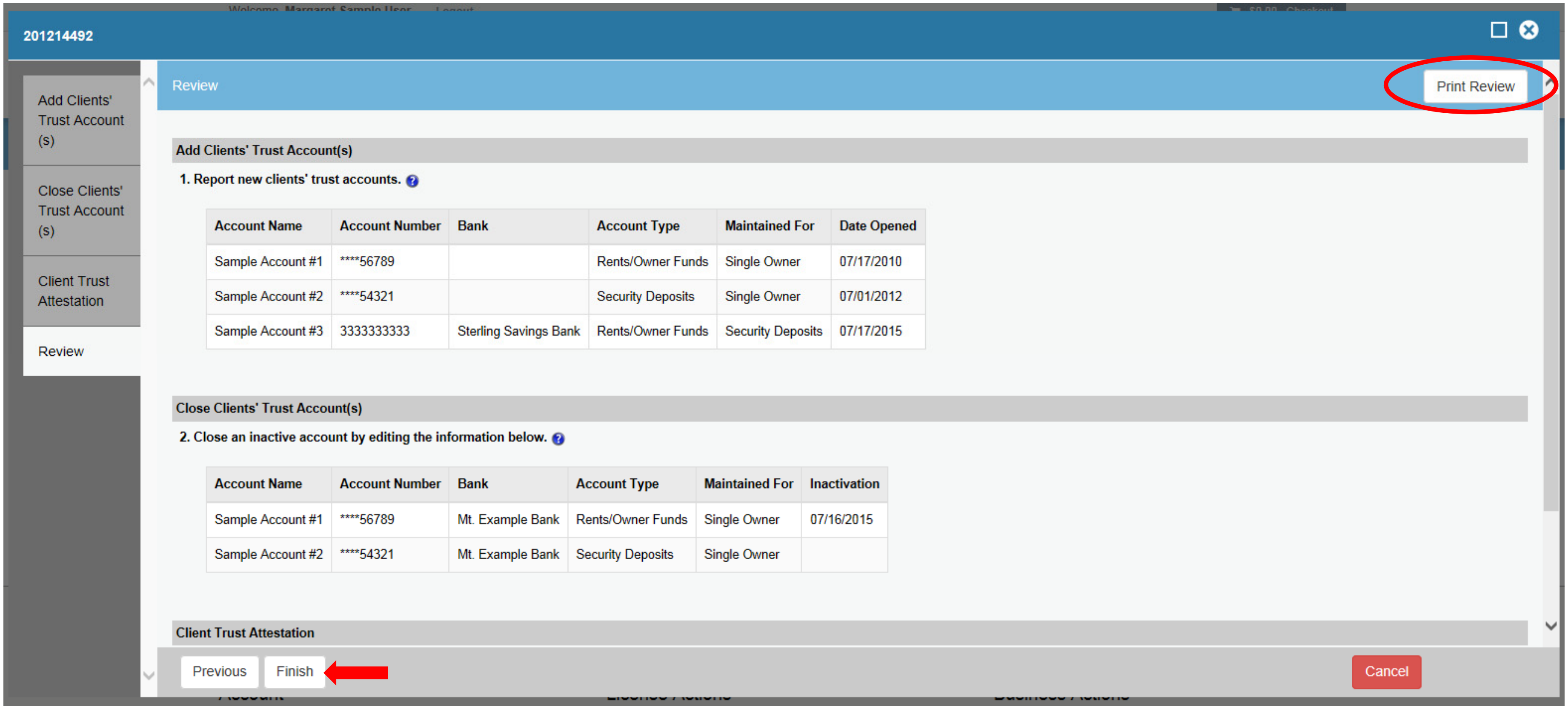
- Enter the date closed
- Click *"OK"*



- Inactivated account will now appear with the inactivation date.
- Click *"next"* to proceed.



- The user must attest to the information recorded by entering their full legal name.
- Click *"next"* to proceed.



- Click *"Print Review"* to retain a copy of the clients' trust accounts reported.
- Click *"Finish"* to complete the process.

Welcome, **Margaret Sample User** Logout

$0.00 Checkout

OREGON.GOV

HOME MY ACCOUNT ONLINE SERVICES

Add and/or Close Clients' Trust Accounts

ORS 696.241 requires a principal real estate broker or licensed real estate property manager to provide account information to the Real Estate Agency within 10 business days after the date a Clients' Trust Account is opened or closed. Click the Start link to begin the process to add or close a Clients' Trust Account.

Item

SUCCESS!

You have successfully added or closed a clients trust account.

Item

	Name	License
Start	Real Estate Sample Business	201214492

- This page demonstrates the successful completion of the process.
- Updates are effective immediately.