

Add & Remove Clients' Trust Accounts

The screenshot displays the Oregon.gov website interface. At the top, a navigation bar includes 'Welcome, Margaret Sample User', 'Logout', and a shopping cart icon with '\$0.00 Checkout'. The main navigation menu features 'HOME', 'MY ACCOUNT', and 'ONLINE SERVICES' (highlighted with a red circle). Below the navigation, a user profile section shows 'Welcome, Margaret Sample User' and 'Logout'. A dropdown menu for 'ONLINE SERVICES' is open, displaying several categories: 'Account' (My Account, Change Address/Phone, Legal Name Change), 'License Actions' (Certified License History, Print License, Inactivate my License, Operate Under my Own License), 'License Lookup & Download Lists' (License Lookup, Generate List(s), Download List(s)), and 'Business Actions' (Add/Close Clients' Trust Account(s), Add/Remove Licensees, Registered Business Name Application). A red arrow points to the 'Add/Close Clients' Trust Account(s)' link. Below the 'Business Actions' section, there is a 'License Applications' section with a 'Broker Application' link. A text box above the dropdown menu asks 'Is this your current email address?' and provides a 'Change Email Address' link. The background of the page shows a scenic view of a mountain range.

Welcome, Margaret Sample User Logout \$0.00 Checkout

OREGON.GOV HOME MY ACCOUNT **ONLINE SERVICES**

Welcome Current License Information Expiration Information (Name Order) Expiration Information (Renewal Date Order)

Select from actions in the Online Services menu above.

Is the email address on record with the Real Estate Agency accurate? See below. If not, please click 'My Account' in the left navigation menu to update.

Is this your current email address?

eLicense.test@state.or.us

Change Email Address

Welcome, Margaret Sample User Logout \$0.00 Checkout

OREGON.GOV HOME MY ACCOUNT ONLINE SERVICES

Account
My Account
Change Address/Phone
Legal Name Change

License Actions
Certified License History
Print License
Inactivate my License
Operate Under my Own License

License Lookup & Download Lists
License Lookup
Generate List(s)
Download List(s)

Business Actions
[Add/Close Clients' Trust Account\(s\)](#)
Add/Remove Licensees
Registered Business Name Application

License Applications
Broker Application

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

- Click “Start” to begin the process.

Welcome, Margaret Sample User Logout \$0.00 Checkout

 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

Name	License
Start Real Estate Sample Business	201214492

201214492

Add Clients' Trust Account(s)

1. Report new clients' trust accounts. ⓘ

Account Name	Account Number	Bank	Account Type	Maintained For	Date Opened
Sample Account #1	****56789		Rents/Owner Funds	Single Owner	07/17/2010
Sample Account #2	****54321		Security Deposits	Single Owner	07/01/2012

[Add](#)

Previous Next [Cancel](#)

- Current clients' trust accounts display.
- Click “next” if there are no new accounts to add but you would like to remove an account.
- Click “add” to report a new clients' trust account.

Add Clients' Trust Account

Report new clients' trust accounts.

Supervisor

*

Account Name

*

Account Number

*

Bank

*

Account Type

*

Maintained For

*

Date Opened

*  (MM/DD/YYYY) Today

OK

Cancel

- Click "OK" upon completion.

201214492

Add Clients' Trust Account(s)

1. Report new clients' trust accounts. ?

Account Name	Account Number	Bank	Account Type	Maintained For	Date Opened
Sample Account #1	****56789		Rents/Owner Funds	Single Owner	07/17/2010
Sample Account #2	****54321		Security Deposits	Single Owner	07/01/2012
Sample Account #3	3333333333	Sterling Savings Bank	Rents/Owner Funds	Security Deposits	07/17/2015



- Click **“add”** to report additional accounts.
- Click **“next”** to proceed.

201214492

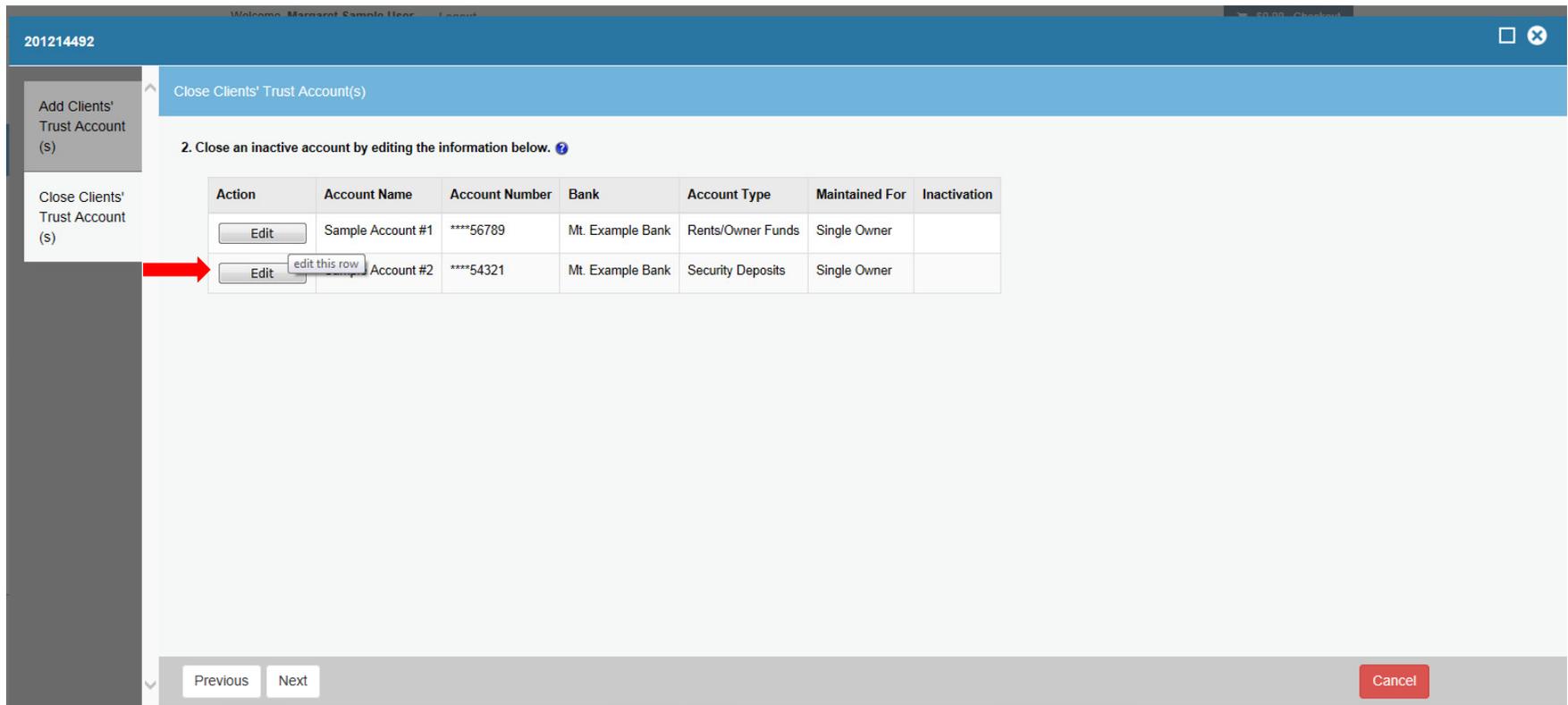
Welcome, Margaret Sample Hear Logout

Close Clients' Trust Account(s)

2. Close an inactive account by editing the information below. ?

Action	Account Name	Account Number	Bank	Account Type	Maintained For	Inactivation
<input type="button" value="Edit"/>	Sample Account #1	****56789	Mt. Example Bank	Rents/Owner Funds	Single Owner	
<input type="button" value="Edit"/>	Account #2	****54321	Mt. Example Bank	Security Deposits	Single Owner	

Previous Next



- Click “*edit*” to remove an account

Welcome Margaret Camala Hear Logout

Edit Clients' Trust Account

Close an inactive account by editing the information below.

Supervisor

* Real Estate Sample Business, RBN.201214492

Inactivation

07/16/2015 (MM/DD/YYYY) Today

OK Cancel

- Enter the date closed
- Click "OK"

201214492

Welcome, Margaret Sample Hear Logout

Close Clients' Trust Account(s)

2. Close an inactive account by editing the information below. ?

Action	Account Name	Account Number	Bank	Account Type	Maintained For	Inactivation
<input type="button" value="Edit"/>	Sample Account #1	****56789	Mt. Example Bank	Rents/Owner Funds	Single Owner	07/16/2015
<input type="button" value="Edit"/>	Sample Account #2	****54321	Mt. Example Bank	Security Deposits	Single Owner	

Previous Next

Cancel

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

Add Clients'
Trust Account
(s)

Close Clients'
Trust Account
(s)

Client Trust
Attestation

Client Trust Attestation

Fields marked with an asterisk * are required.

3. The named banks are hereby authorized to furnish information requested by the Real Estate Commissioner and/or authorized representative concerning the accounts reported.

I certify that the listed bank accounts are all of the trust accounts maintained by this firm. The Real Estate Commissioner shall be notified by the licensee immediately if any new trust accounts are opened, existing accounts closed, or if any changes in present accounts occur.

*

Previous

Next

Cancel

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

201214492

Welcome, Margaret Sample User Logout

Review

Print Review

Add Clients' Trust Account(s)

1. Report new clients' trust accounts. ?

Account Name	Account Number	Bank	Account Type	Maintained For	Date Opened
Sample Account #1	****56789		Rents/Owner Funds	Single Owner	07/17/2010
Sample Account #2	****54321		Security Deposits	Single Owner	07/01/2012
Sample Account #3	3333333333	Sterling Savings Bank	Rents/Owner Funds	Security Deposits	07/17/2015

Close Clients' Trust Account(s)

2. Close an inactive account by editing the information below. ?

Account Name	Account Number	Bank	Account Type	Maintained For	Inactivation
Sample Account #1	****56789	Mt. Example Bank	Rents/Owner Funds	Single Owner	07/16/2015
Sample Account #2	****54321	Mt. Example Bank	Security Deposits	Single Owner	

Client Trust Attestation

Previous Finish  Cancel

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



Add and/or Close Clients' Trust Accounts

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[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.