

## 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 header features the 'OREGON.GOV' logo and navigation links for 'HOME', 'MY ACCOUNT', and 'ONLINE SERVICES' (which is circled in red). Below the header, a secondary navigation bar contains tabs for 'Welcome', 'Current License Information', 'Expiration Information (Name Order)', and 'Expiration Information (Renewal Date Order)'. A message prompts the user to 'Select from actions in the Online Services menu above.' and asks if the email address on record is accurate. A form field shows 'eLicense.test@state.or.us' with a 'Change Email Address' button. The main content area is divided into three columns: 'Account' (My Account, Change Address/Phone, Legal Name Change), 'License Actions' (Certified License History, Print License, Inactivate my License, Operate Under my Own License), 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 is the 'License Applications' section with a 'Broker Application' link. At the bottom, a 'License Lookup & Download Lists' section includes 'License Lookup', 'Generate List(s)', and 'Download List(s)'. A callout box on the left contains the instruction: 'Click "Add/Close Clients' Trust Account(s)" in the "ONLINE SERVICES" menu.'

- 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

**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

Name	License
<a href="#">Start</a> 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

\* Test Business, RBN.000121078 ▾

### Account Name

\*

### Account Number

\*

### Bank

\* - select one - ▾

### Account Type

\* - select one - ▾

### Maintained For

\* - select one - ▾

### Date Opened

\* 11/27/2018  (MM/DD/YYYY) Today

### Upload a completed copy of the Notice of Clients Trust Account & Authorization to Examine Form?

No document(s) uploaded for this question.

Select a document to upload:

Browse...

\* File types accepted: ach, bmp, doc, docx, eri, fil, jpg, m4a, mp3, mp4, msg, pdf, rtf, tif, txt, vsd, wma, wpd, xls, xlsx

- After you have answered the required fields and uploaded a Notice of Clients Trust Account & Authorization to Examine Form, click **"OK"**. **Note:** This form is available on our website at [www.oregon.gov/rea](http://www.oregon.gov/rea)

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

Add

Previous Next

Cancel

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

201214492

Welcome, Margaret Sample Here

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 Emma Heer 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

Print Review

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

Process Completed Successfully.

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
<a href="#">Start</a>	Test Business	

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