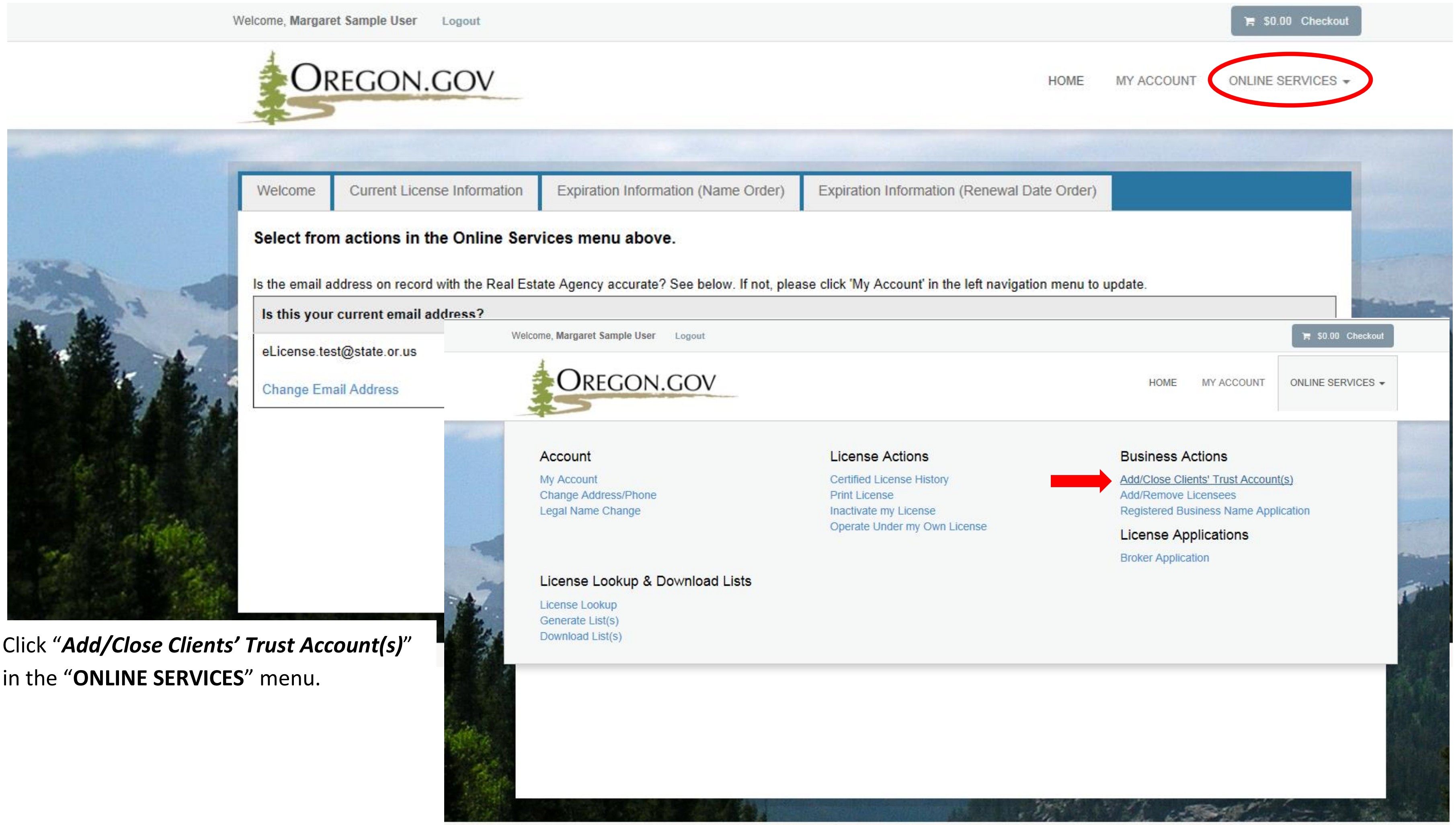
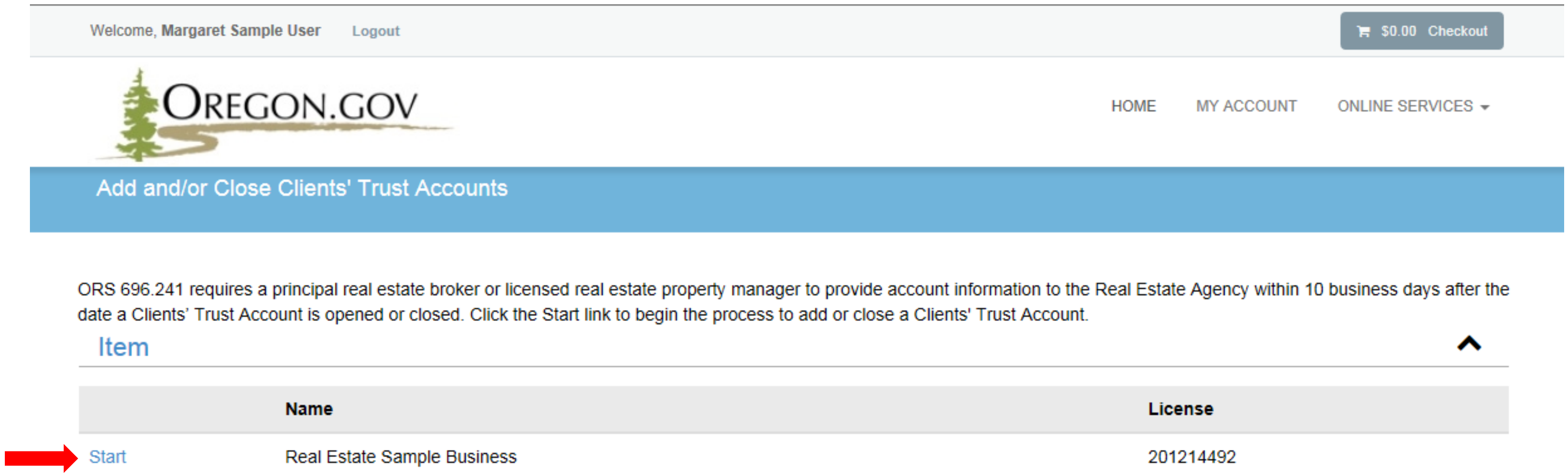
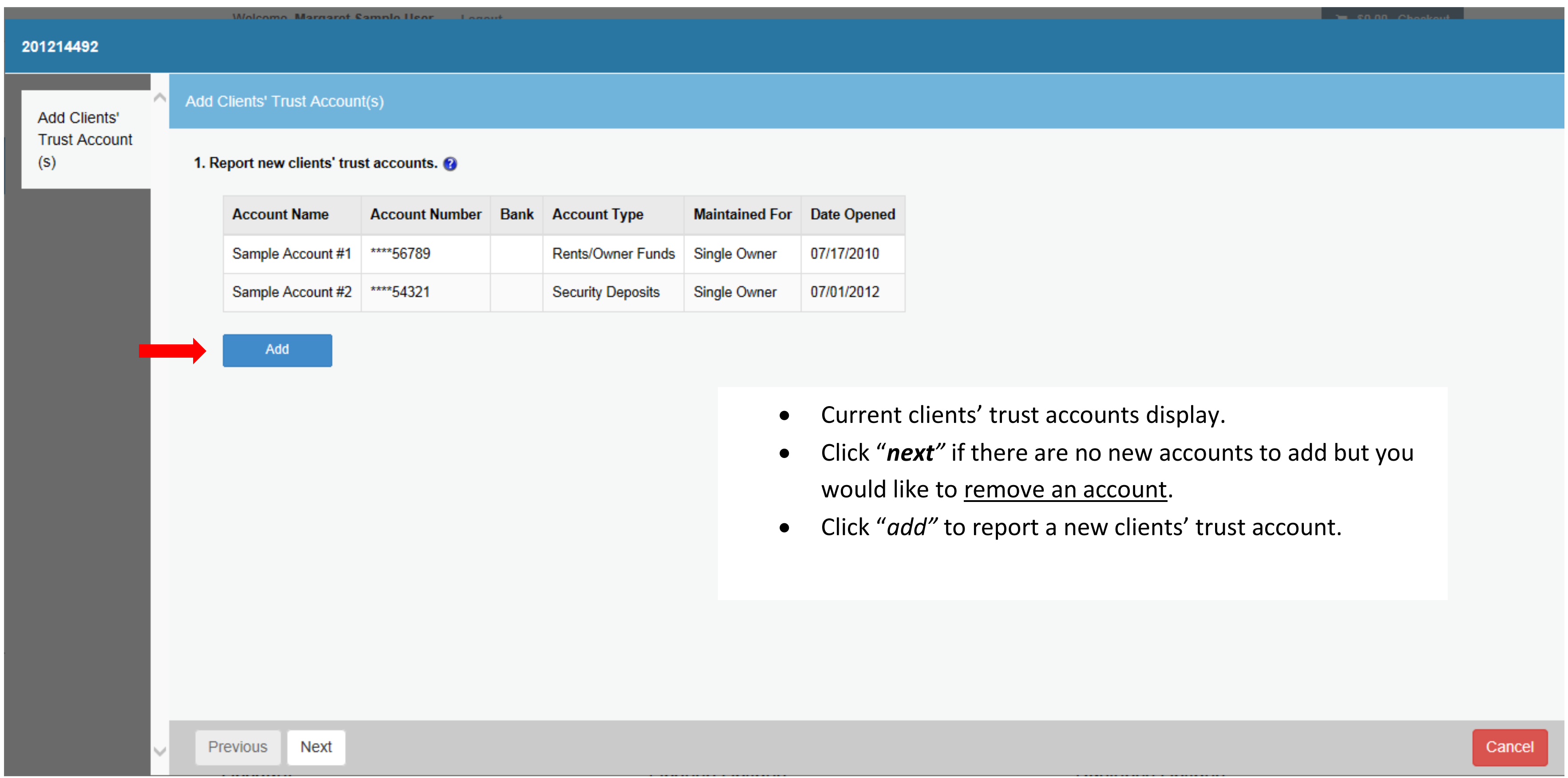
Add & Remove Clients’ Trust Accounts



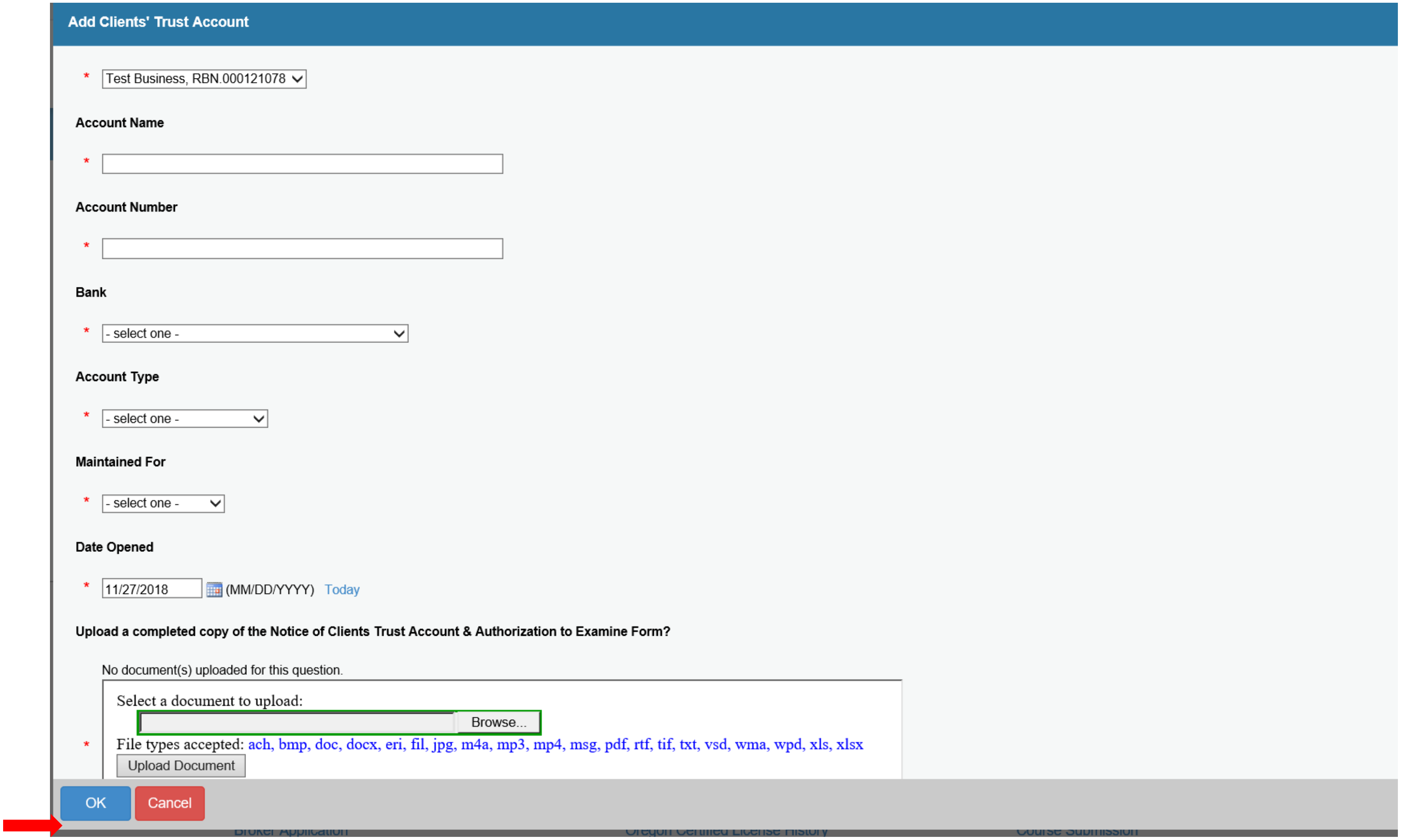
- Click “***Add/Close Clients’ Trust Account(s)***” in the “**ONLINE SERVICES**” menu.

- 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 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:

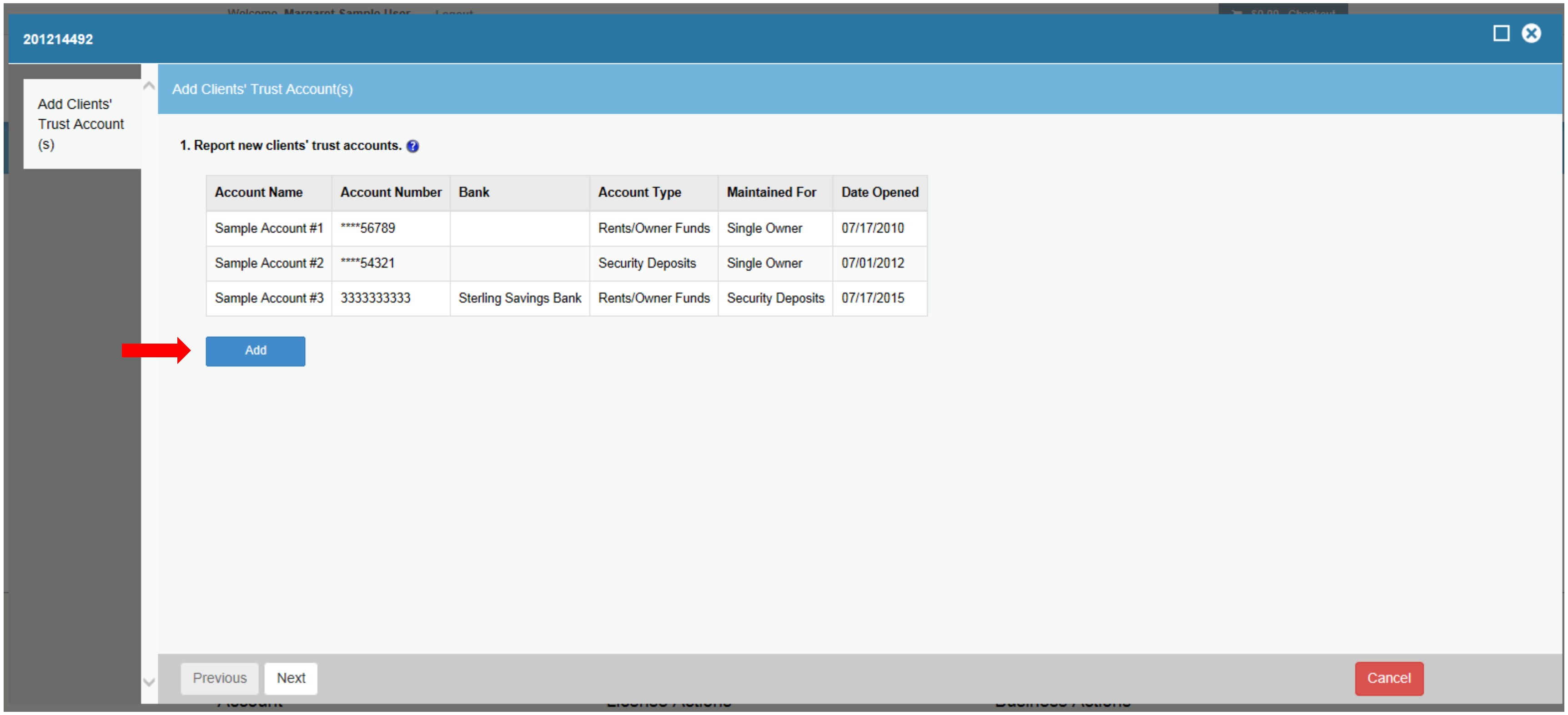
Browse...

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

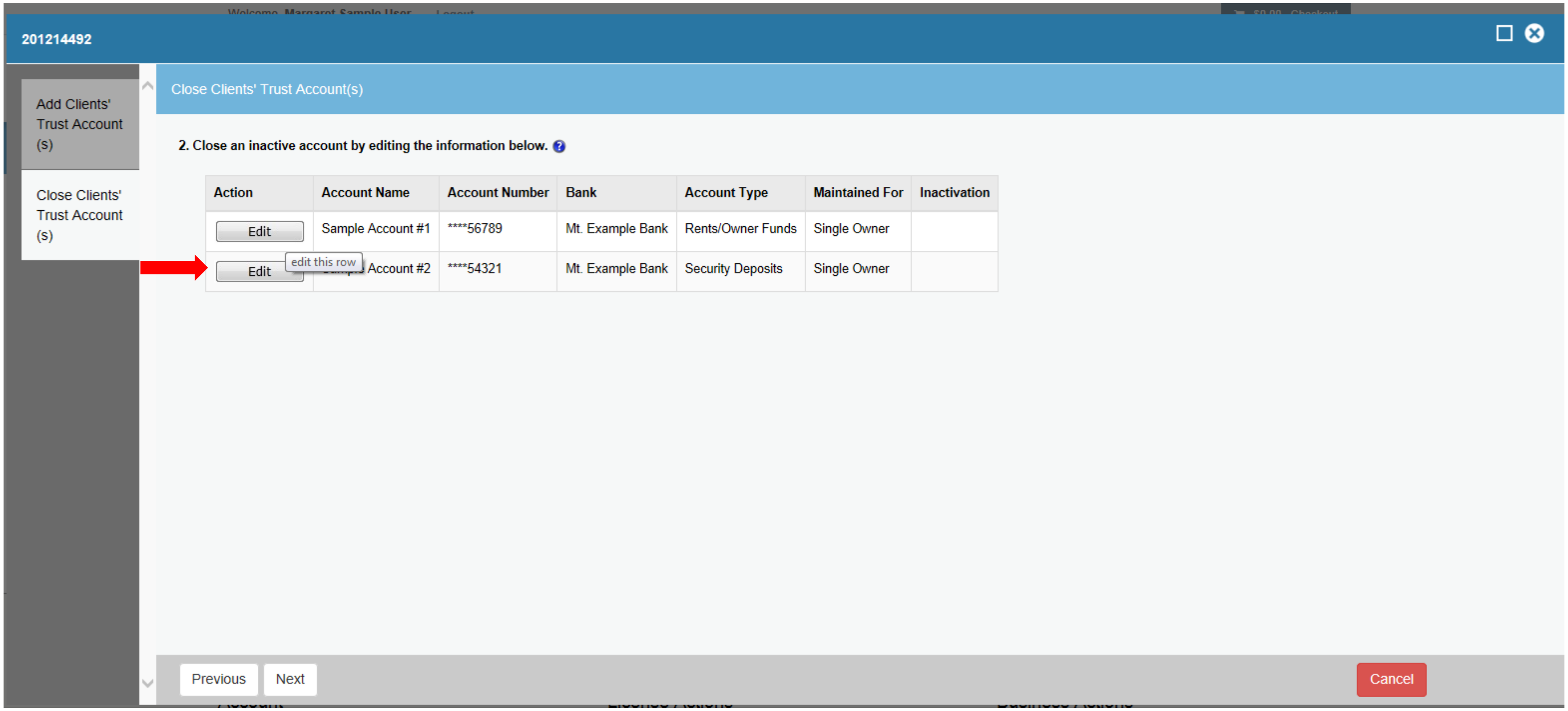
Upload Document

OK Cancel

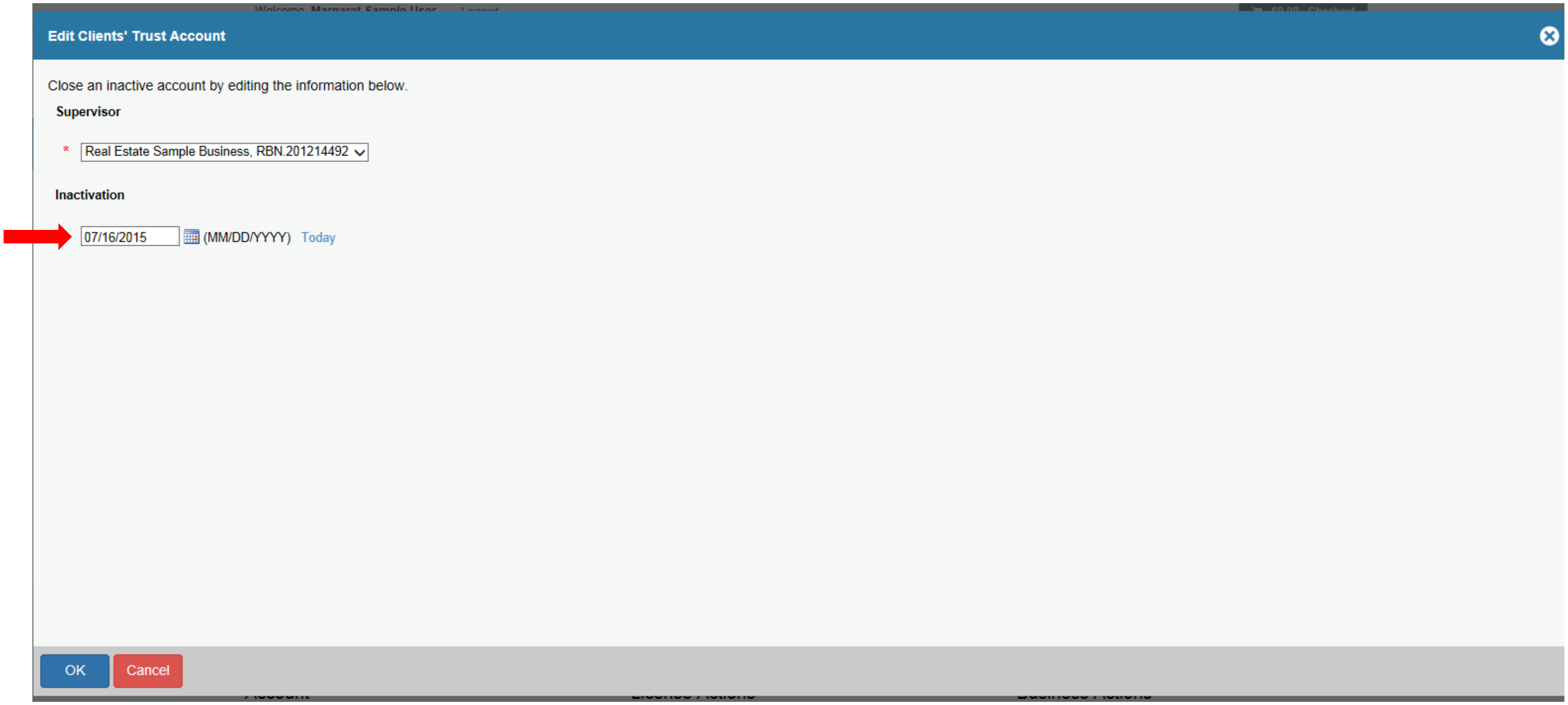
- After you have answered the required fields and uploaded a Notice of Clients Trust Account & Authorization to Examine Form, click "***OK***". **Note:** This form is available on our website at www.oregon.gov/rea



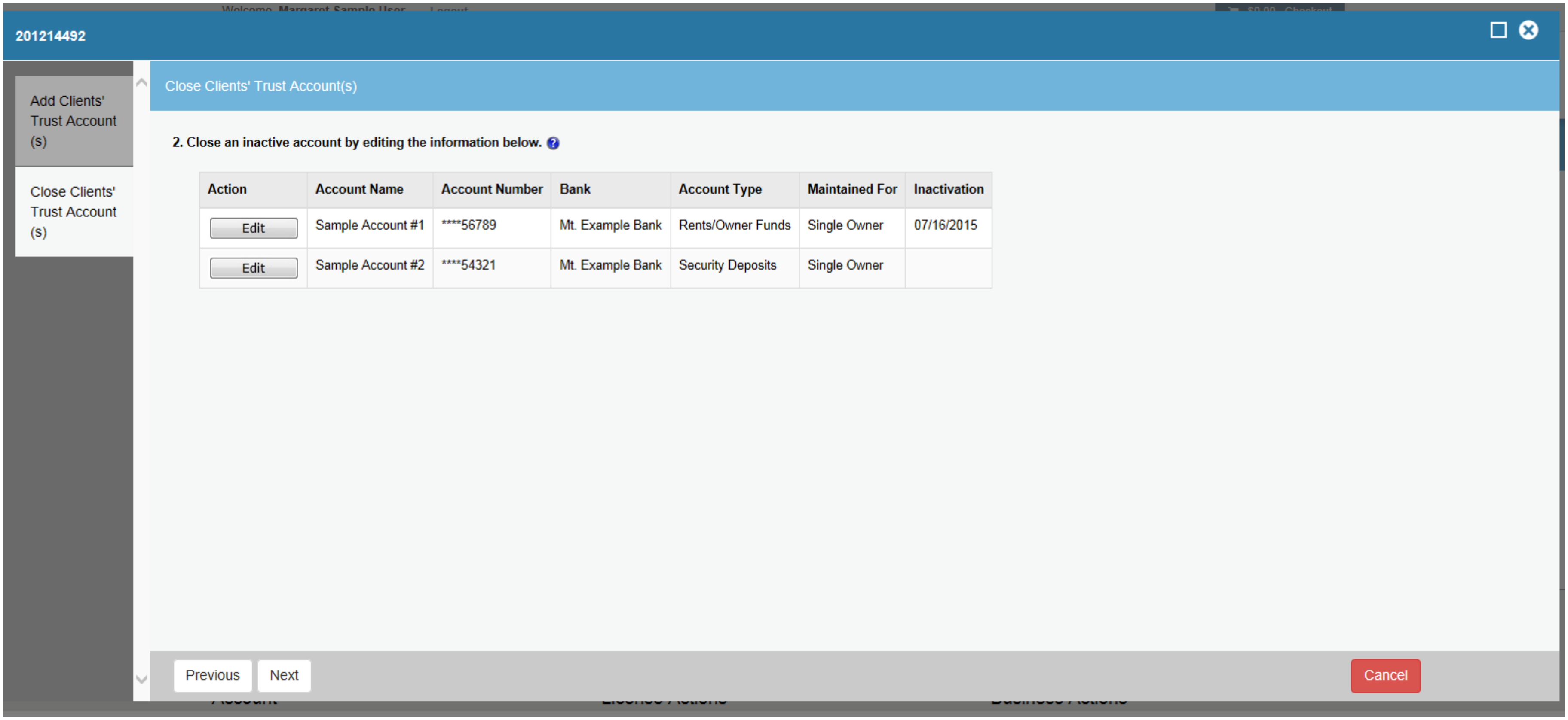
- Click “***add***” to report additional accounts.
- Click ***“next”*** to proceed.



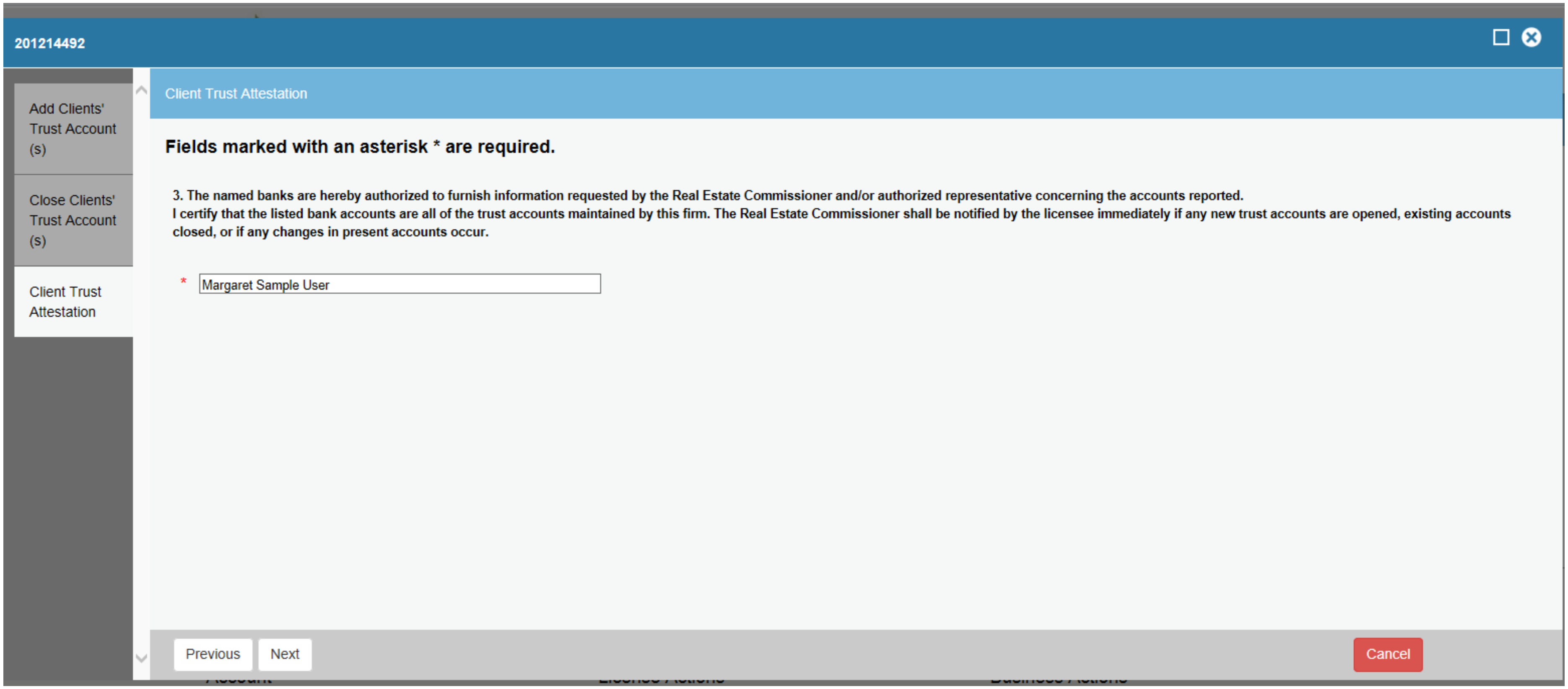
- Click "***edit***" to remove an account



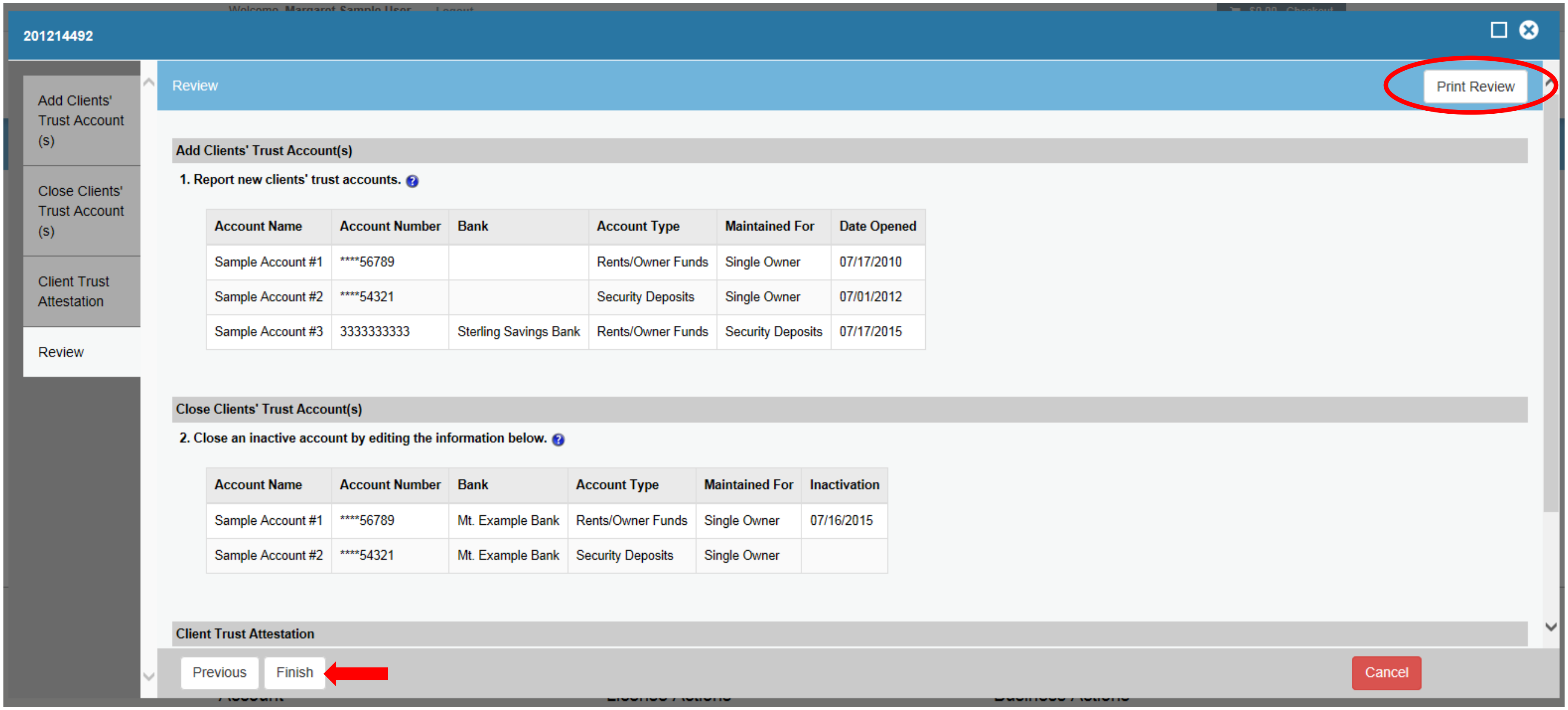
- Enter the date closed
- Click ***"OK"***



- 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.


201214492

Review

Print Review

Add Clients' Trust Account (s)

Close Clients' Trust Account (s)

Client Trust Attestation

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.

Welcome, **Test Test** Logout

$0.00 Checkout

OREGON.GOV

HOME MY ACCOUNT ONLINE SERVICES

Add and/or Close Clients' Trust Accounts

Process Completed Sucessfully.

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	Test Business	

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