

# Add or Remove a Trust to an Auto or Powersports Policy

PolicyCenter



## Description

This job aid reviews how to add and remove a trust on an Auto or Powersports Policy.

As a general rule, a Living Trust in the name of the Named Insured(s) is acceptable for a Personal Lines Policy.

First, you need to create a Policy Change by selecting “Policy Transaction > Actions > Change Policy”.

*NOTE: If the mailing address is changed to the Trust's address, the policyholder will not receive any correspondence.*

Select the appropriate link to advance to the desired procedure:

- [Add a Trust](#)
- [Remove a Trust](#)

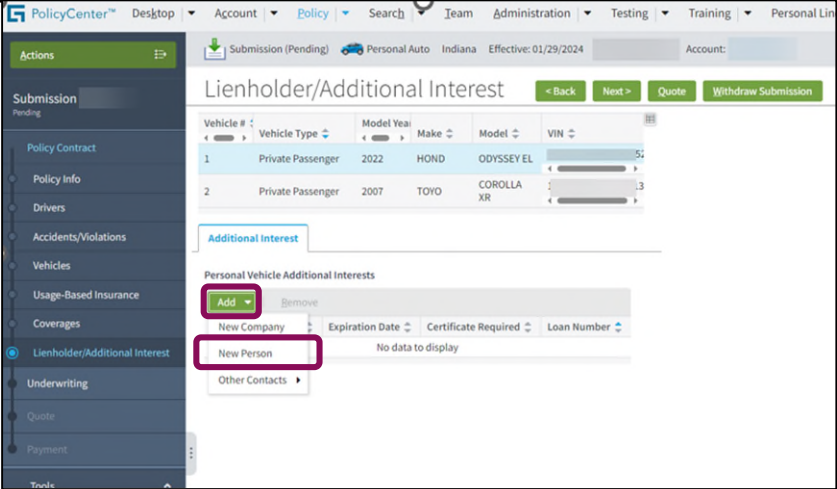
## Add a Trust

### Step 1

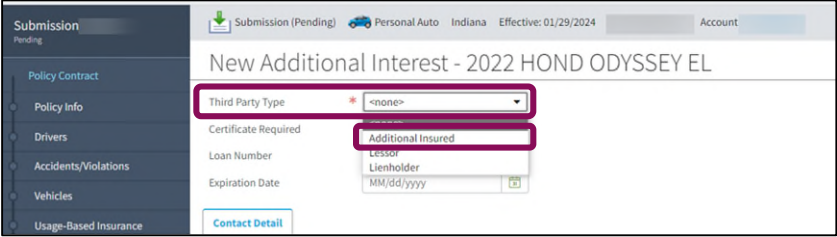
Action	Screen
<p>From the “Lienholder/Additional Interest” screen:</p> <ul style="list-style-type: none"><li>• Select a vehicle.</li></ul> <div><div>!</div><div>It does not matter which vehicle you choose. Nationwide recognizes that the Trust is for all vehicles.</div></div>	

### Add a Trust, continued

#### Step 2

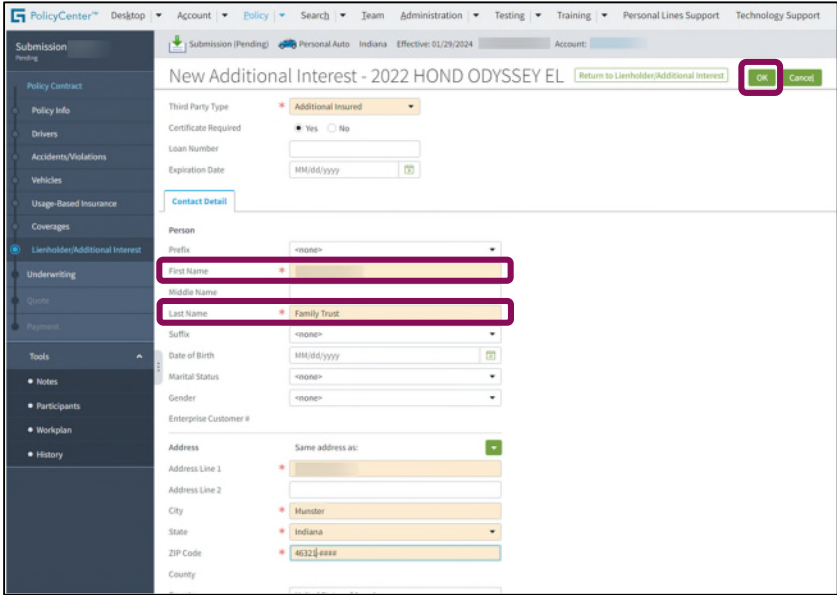
Action	Screen
<p>From the “Additional Interest” tab:</p> <ul style="list-style-type: none"><li>Select “Add” and then “New Person”.</li></ul>	

#### Step 3

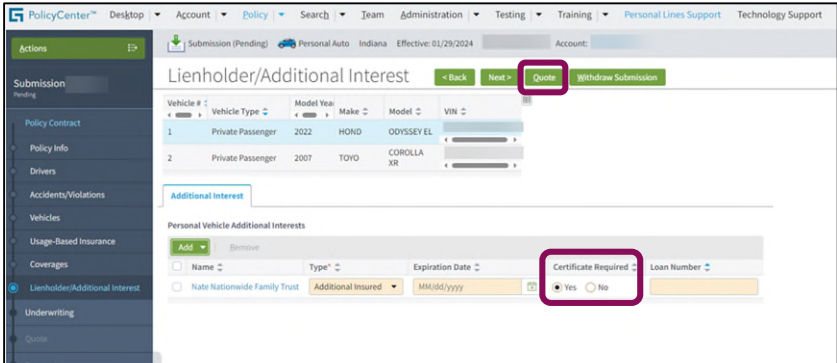
Action	Screen
<p>From the “New Additional Interest” screen.</p> <ul style="list-style-type: none"><li>Select “Additional Insured” from the “Third Party Type” drop-down list.</li></ul>	

### Add a Trust, continued

#### Step 4

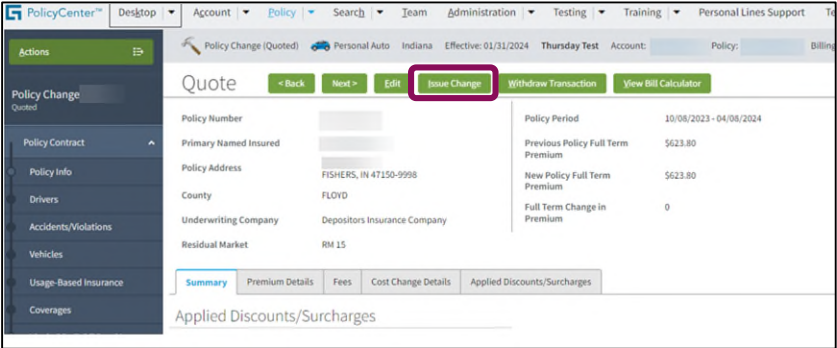
Action	Screen
<p>On the “Contact Detail” tab:</p> <ul style="list-style-type: none"><li>Enter the contact information for the Trust.</li></ul> <div><p>! “First Name” and “Last Name” are required fields.</p><p>Enter the name of the trust in the “First Name” field and “Trust” in the “Last Name” field.</p></div> <ul style="list-style-type: none"><li>Select “OK”.</li></ul>	

#### Step 5

Action	Screen
<p>You should be back on the “Lienholder/Additional Interest” main page.</p> <div><p>! The “Certificate Required” field defaults to “Yes”.</p></div> <ul style="list-style-type: none"><li>Select the “Quote” button.</li></ul>	

### Add a Trust, continued

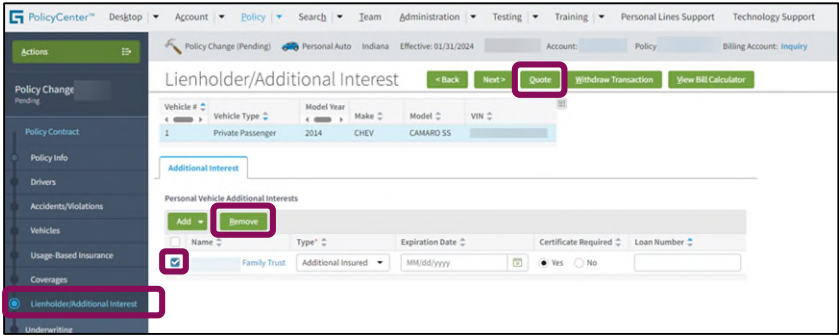
### Step 6

Action	Screen
On the “Quote” screen: <ul style="list-style-type: none"><li>Select “Issue Change”.</li></ul>	

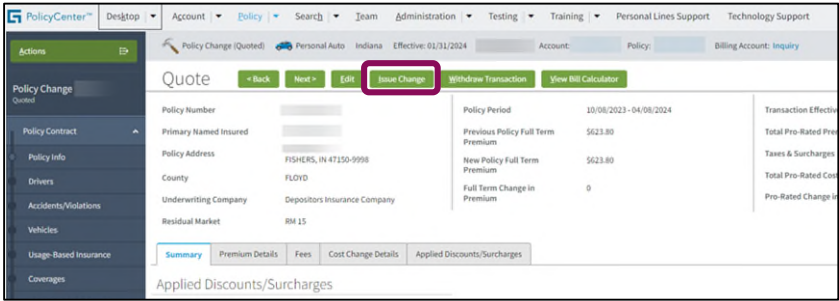
[Return to Top](#)

### Remove a Trust

#### Step 1

Action	Screen
<p>Start a Policy Change and navigate to the “Lienholder/Additional Interest” screen.</p> <ul style="list-style-type: none"><li>Place a check mark in the box next to the trust you wish to remove.</li><li>Select the “Remove” button.</li><li>Select the “Quote” button.</li></ul>	

#### Step 2

Action	Screen
<p>From the “Quote” screen.</p> <ul style="list-style-type: none"><li>Select the “Issue Change” button.</li></ul>	

### [Return to Top](#)

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