# 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
- <u>Remove a Trust</u>

#### Add a Trust

Step 1	
Action	Screen
<ul> <li>From the "Lienholder/Additional Interest" screen:</li> <li>Select a vehicle.</li> <li>It does not matter which vehicle you choose. Nationwide recognizes that the Trust is for all vehicles.</li> </ul>	PolicyCenter** Desktop   Account Policy   Submission Personal Auto   Nodel PolicyContract   PolicyContract Private Passenger   2 Private Passenger   3 Passenger   3 Passenger   4 Passenger   4 Passenger <t< td=""></t<>

# Add a Trust, continued

Step	2

Action	Screen
From the "Additional Interest" tab: • Select "Add" and then "New Person".	PolicyCenter* Desktop • Account • Policy • Search Ieam Administration • Testing • Training • Personal Lin Actions :: Submission Pending: Personal Auto Indiana Effective: 01/29/2024 Account: Lienholder/Additional Interest • Back Net> Quote Wethdraw Submission Policy Contract Private Passenger 2007 TOYO COROLA : Accidents/Violations Additional Interests Vehicles Personal Vehicle Additional Interests No data to display Other Contacts • Tools
Step 3	
Action	Screen
<ul><li>From the "New Additional Interest" screen.</li><li>Select "Additional Insured" from the "Third Party Type" drop-down list.</li></ul>	Submission       Personal Auto       Indiana       Effective: 01/29/2024       Account         Pedieg       New Additional Interest - 2022 HOND ODYSSEY EL         Policy Contract       Third Party Type       Indiana       Effective: 01/29/2024       Account         Policy Contract       Certificate Required       Indiana Insured       Indiana       Espiration Date         Drivers       Certificate Required       Indiana Insured       Indiana       Espiration Date         Vehicles       Usage-Based Insurance       Contact Detail       Contact Detail       Contact Detail

# Add a Trust, continued

# Step 4

Action	Screen
<ul> <li>On the "Contact Detail" tab:</li> <li>Enter the contact information for the Trust.</li> <li>"First Name" and "Last Name" are required fields.</li> <li>Enter the name of the trust in the "First Name" field and "Trust" in the "Last Name" field.</li> <li>Select "OK".</li> </ul>	FolicyCenter*       Detailsip       Account       Exactly       Searchy       Teaching       Teaching       Personal Lines Support       Technology Support         Network       Stadmission       Index       Encource       Account       Technology Support         Network       Account       Stadmission       Index       Encource       Account       Technology Support         Network       Account       Mexicy Centract       Network       Account       Technology Support         Network       Account       Network       Account       Technology Support       Technology Support         Network       Account       Network       Account       Technology Support       Technology Support         Network       Account       Network       Account       Technology Support       Technology Support         Network       Account       Account       Network       Account       Technology Support         Network       Centract       Account       Network       Technology Support       Technology Support         Network       Centract       Network       Technology Support       Technology Support       Technology Support         Network       Centract       Technology Support       Technology Support       Technology Support
Step 5	
Action	Screen
You should be back on the "Lienholder/Additional Interest" main page.	PolicyCenter® Desktop      Account      Policy      Search      Imam Administration      Testing      Training      Personal Lines Support      Technology Support     Account:     Submission     Policy     Count     Velicle      Velic
<ul> <li>The "Certificate Required" field defaults to "Yes".</li> <li>Select the "Quote" button.</li> </ul>	Policy Mo     2 Private Passenger 2007 TO/O X8     CORCLA     Additional Interest     Additional Interests     Unage-based Insurance     Moderwrting     Underwrting     One

#### Add a Trust, continued

### Step 6



#### Return to Top

#### **Remove a Trust**

#### Step 1

and a second	
Action	Screen
<ul> <li>Start a Policy Change and navigate to the "Lienholder/Additional Interest" screen.</li> <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>	PolicyCenter** Desktop       Account       Policy * Search       Team       Administration       Testing       Training       Personal Lines Support       Technology Support         Account       Policy Change       Personal Auto       Index       Metcher       Policy Change       Policy Change </td
Step 2	
Action	Screen
From the "Quote" screen.	

PolicyCenter" Desktop - Account - Policy - Search - Jeam

Quote

Policy Number

Policy Address

Residual Market

Primary Named Insi

<Back Next> Edit

FLOYD

RM 15

Applied Discounts/Surcharges

FISHERS, IN 47150-9998

Summary Premium Details Fees Cost Change Details Applied Discounts/Surcharges

• Select the "Issue Change" button.

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Policy Period

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New Policy Full Term Premium