

Savings Bonds—Redemption and Reissue Instructions for Nonadministered Estates



NOTES: The forms identified in this publication and more [information on nonadministered estates](#) are available at www.treasurydirect.gov.

IMPORTANT INSTRUCTIONS

All securities belonging to the decedent's estate must be included in one transaction on a *Disposition of Treasury Securities Belonging to a Decedent's Estate Being Settled Without Administration* (FS Form 5336) and signed by one voluntary representative.

All bonds must be described by serial number, where indicated, on any form submitted. All bonds and/or forms, except *Direct Deposit Sign-Up Form* (FS Form 5396), must be signed in the presence of an authorized certifying officer, available at most financial institutions. The certifying officer must sign, include his or her title, and affix the institution's official stamp or seal in the space provided.

For transactions involving nonadministered estates:

- If more than one person is named on the bonds, provide certified copies of the death certificates for both. Each death certificate must be certified or sworn to by the state or local registrar, with a legible seal or stamp, as a true and correct copy taken from the official records.
- We don't return death certificates or other legal evidence.
- When we reissue a Series EE or Series I savings bond, we no longer provide a paper bond. The reissued bond is in electronic form, in our online system TreasuryDirect. For information on [how to open an account](#) in TreasuryDirect, go to www.treasurydirect.gov.
- Bonds can't be distributed to a trust.

TO PAY BONDS TO A VOLUNTARY REPRESENTATIVE OF A NONADMINISTERED ESTATE:

- The person applying as voluntary representative must complete a *Disposition of Treasury Securities Belonging to a Decedent's Estate Being Settled Without Administration* ([FS Form 5336](#)). The person completing the form must be qualified to request disposition in accordance with the Order of Precedence shown in Part B of the form.

The bonds must be described on FS Form 5336 in Part D, Item 2, or a list of the bonds must be attached to the form and Item 2 of Part D noted "See Attached List."

NOTE: If payment is made to a voluntary representative, interest earned will be reported to the Internal Revenue Service as taxable income under the voluntary representative's Taxpayer Identification Number.

TO DISTRIBUTE BONDS TO THE PERSON(S) ENTITLED TO A NONADMINISTERED ESTATE

- The person applying as voluntary representative must complete a *Disposition of Treasury Securities Belonging to a Decedent's Estate Being Settled Without Administration* ([FS Form 5336](#)). The person completing the form must be qualified to request disposition in accordance with the Order of Precedence shown in Part B of the form.

The bonds must be described on FS Form 5336 in Part F, Item 2, or a list of the bonds must be attached to the form and Item 2 of Part F noted "See Attached List." If distribution is made to more

than one person, Part F of FS Form 5336, or the attached list, must show which securities are to be distributed to each person entitled and to what extent.

- **If the person entitled wants to cash the bond(s):** The person entitled to the bond(s) must complete a *Special Form of Request for Payment of United States Savings and Retirement Securities Where Use of a Detached Request Is Authorized* ([FS Form 1522](#)). The Taxpayer Identification Number and address of the person entitled must be provided.
- **If the persons entitled want to reissue the bond(s) in their name:** Each person entitled to the bond(s) must complete a *Request To Reissue United States Savings Bonds* ([FS Form 4000](#)).
- **If any person(s) entitled wants to reissue the bond(s) to a trust,** each person(s) entitled must complete and sign a *Request To Reissue United States Savings Bonds to a Personal Trust* ([FS Form 1851](#)), in accordance with the instructions. Item 5 must be completed.
- If Series HH bonds are being reissued, the person entitled must also complete a *Direct Deposit Sign-Up Form* ([FS Form 5396](#)) for direct deposit of the interest payments.

FINAL MATURITY INFORMATION

Any bonds that have reached final maturity may not be reissued. The only option is to cash the bonds.

Series	Issue Date	Final Maturity	Series	Issue Date	Final Maturity
E	5/41 to 11/65	40 Years	H	2/57 to 12/79	30 Years
E	12/65 to 6/80	30 Years	HH	All issues	20 Years
EE	All issues	30 Years	I	All issues	30 Years
H	6/52 to 1/57	29 years, 8 months	Savings Notes	All issues	30 Years

Unless instructed otherwise, send required documents to:

Treasury Retail Securities Services
 PO Box 9150
 Minneapolis, MN 55480-9150

Phone: 844-284-2676 (toll free)