
(name)

(address)

(city, state, zip)

_____(_____)_____

(phone)

Attn: **Personal Account Representative** _____
(enter name of bank or credit union)

Re: Transfer of My Banking Investments to My Living Trust

DEAR ACCOUNT REPRESENTATIVE:

Please be advised that I have prepared a **Trustworthy E-Z Forms™** Revocable Living Trust. I would certainly appreciate your efforts in assisting me in the transfer of my banking investments to my trust. **Do not transfer IRA accounts.** All checking and savings accounts, money markets, CD's, etc., should have the account title or signature card read in the following format. Please insert the supplied information as required.

Trustee1 and/or **Trustee2**, trustees of the "**TRUST NAME**" Trust, U/T/D dated _____, 19_____.
(fill in date)

Trustee1 is _____

Trustee2 is _____

My trust's name is _____
(fill in name of trust)

Only One Signature Required. This trust specifically allows the trustor acting as trustee, and the cotrustee to sign checks, deposits, make checking and savings withdrawals and otherwise manage banking investments without the signature of the other. (please see article 6.3.(1) of the trust.)

Federal Tax Identification Number. Because this trust is a "Revocable Living Trust" a tax I.D. number is not required (IRC Section 676). Please continue to use my social security number.

I realize that in addition to this letter, you may still need to examine or even copy portions of my trust. Please contact me for further information or if there is any question. Thank you for your assistance in the matter.

Dated: _____, 19_____

Trustor/trustee

(name)

(address)

(city, state, zip)

_____(_____)_____

(phone)

Attn: **Personal Account Representative** _____
(enter name of bank or credit union)

Re: Transfer of My Banking Investments to My Living Trust

(do not transfer my IRA and Keogh accounts)

DEAR ACCOUNT REPRESENTATIVE:

Please be advised that I have prepared a **Trustworthy E-Z Forms™** Revocable Living Trust. I would certainly appreciate your efforts in assisting me in the transfer of my banking investments to my trust. All checking and savings accounts, money markets, certificates of deposit, etc., that presently stand in my name should have the account title or signature card changed to read in the following format inserting my name as required:

MYNAME, trustee of the **TrustName** Trust, U/T/D dated _____, 19____.
(fill in date of trust)

My name should appear as: _____.

My Trust's name is: _____.

Deputization of Accounts. The trust specifically empowers the trustor/trustee to DEPUTIZE any successor trustee as an additional signature on any bank account. If your bank has such designations, please assist me in signing the necessary forms so that neither I nor my successor trustee(s) would be inconvenienced in an emergency. (Please see article 6.3.(k) of the trust.)

Federal Tax Identification Number. Because this trust is a "Revocable Living Trust" a tax I.D. number is not required. Please continue to use my social security number (IRC Section 676). I realize that in addition to this letter, you may still need to examine or even copy portions of the trust. Please contact me for further information or if there is any question. Thank you for your assistance in the matter.

Dated: _____, 19_____

Trustor/trustee

(name)

(address)

(city, state, zip)

_____(_____)_____
(phone)

TO: _____ PENSION (OR PLAN ADMINISTRATOR/TRUSTEE)
(Also use for Tax Deferred Annuities)

Pension Plan/IRA/KEOGH Number: _____

EMPLOYEE/ANNUITANT'S NAME: _____

SOCIAL SECURITY NUMBER: _____ - _____ - _____

RE: REQUEST FOR CHANGE OF BENEFICIARY OF PENSION/IRA/KEOGH
(Lump Sum Death Benefit)

Gentlemen:

I have prepared a **Trustworthy E-Z Forms™** Revocable Living Trust and now wish to change the beneficiary designation on my IRA, KEOGH, SALARIED SAVINGS or such other pension plan which might pay a lumpsum death benefit. I am the employee/plan participant. Kindly return a copy of this form showing an acceptance of the change and effective date for my records. Please change the designation as follows:

FULL NAME OF NEW BENEFICIARY:

Primary Beneficiary: "The trustee or successor trustee of the:

_____ TRUST dated _____, 19 ____."

(enter name of trust)

(enter date of trust)

I hereby revoke all designations of beneficiary and all elections of optional settlement methods previously made and subject to the terms of, and subject to changes as provided in the applicable contracts, I hereby designate the above beneficiary.

Dated: _____, 19 _____

Trustor/trustee

_____ (name)

_____ (address)

_____ (city, state, zip)

_____(_____)_____ (phone)

Attn: Investment and Account Representative

Re: Transfer of Investments and Brokerage Accounts to My Living Trust

_____ account number(s)

DEAR BROKER/FINANCIAL PLANNER:

Please be advised that I have prepared a **Trustworthy E-Z Forms™** Revocable Living Trust. I would certainly appreciate your efforts in assisting me in the transfer of my **stocks, bonds, brokerage accounts, and other investments** to my trust. Do not transfer any IRA or Keogh accounts. All other investments should have the account title or share certificate read in the following format. Please insert the supplied information as required. Either trustee acting as a co-trustee may act alone pursuant to paragraph 1.5.

Trustee1 and/or **Trustee2**, trustees of the **TRUST NAME** Trust, U/T/D dated _____, 19____.
(fill in date)

Trustee1 is _____

Trustee2 is _____

My trust's name is _____
(fill in name of trust)

Power to Invest and Reinvest. This trust specifically allows the trustee(s) to buy, sell, manage and “invest and reinvest” in every kind of investment. (please see Articles 6.1. and 6.3.(j) of the trust.)

Federal Tax Identification Number. Because this trust is a “Revocable Living Trust” a tax I.D. number is not required (IRC Section 676). Please continue to use my social security number.

I realize that in addition to this letter, you may still need to examine or even copy portions of my trust. Please contact me for further information or if there is any question. Thank you for your assistance in the matter.

Dated: _____, 19_____

Trustor/trustee

(name)

(address)

(city, state, zip)
_____(_____)_____
(phone)

Attn: Investment and Account Representative

Re: Transfer of My Investments and Brokerage Accounts to My Living Trust

DEAR BROKER/FINANCIAL PLANNER:

Please be advised that I have prepared a **Trustworthy E-Z Forms™** Revocable Living Trust. I would certainly appreciate your efforts in assisting me in the transfer of my **stocks, bonds, brokerage accounts, and other investments** to my trust. Do not transfer any IRA or Keogh accounts. All other investments should have the account title or share certificate read in the following format inserting my name as required:

MYNAME, trustee, **TRUSTNAME** Trust, U/T/D dated _____, 19_____.
(fill in date of trust)

My name should appear as: _____.
My Trust's name is: _____.

Power to Invest and Reinvest. This trust specifically allows the trustee(s) to buy, sell, manage and “invest and reinvest” in every kind of investment. (please see Articles 6.1. and 6.3.(j) of the trust.)

Federal Tax Identification Number.
Because this trust is a “Revocable Living Trust” a tax I.D. number is not required (IRC Section 676). Please continue to use my social security number.

I realize that in addition to this letter, you may still need to examine or even copy portions of my trust. Please contact me for further information or if there is any question. Thank you for your assistance in the matter.

Dated: _____, 19_____

Trustor/trustee

(name)

(address)

(city, state, zip)

_____(_____)_____

(phone)

Attn: TRANSFER AGENT FOR

CORPORATION STOCK

(Name of Corporation)

Certificate Number(s) _____

Re: Reissuance of Stock Certificate(s) to My Living Trust

Dear Transfer Agent:

Please be advised that I have prepared a **Trustworthy E-Z Forms™** Revocable Living Trust. I would certainly appreciate your efforts in reissuing the enclosed stock certificate in the following format. Please insert the supplied information as required. Either trustee acting as a co-trustee may act alone pursuant to paragraph 1.5. of the trust.

Trustee1 and/or **Trustee2**, trustees of the **TRUSTNAME** Trust, U/T/D dated _____, 19____.
(fill in date)

Trustee1 is _____

Trustee2 is _____

My trust's name is _____
(fill in name of trust)

I have endorsed the stock certificate on the reverse side, and have had my signature guaranteed by a commercial bank. Now that the bank has stamped a guarantee on the stock, I am sending the stock to you by registered mail. I find that your institution is named on the front side of the certificate as the transfer agent for the corporation. Please contact me for further information or if there is some problem reissuing this stock. Thank you for your assistance.

Dated: _____, 19_____

Trustor/trustee

(name)

(address)

(city, state, zip)
_____(_____)_____
(phone)

Attn: TRANSFER AGENT FOR

(Name of Corporation) **CORPORATION STOCK**
Certificate Number(s) _____

Re: Reissuance of My Stock Certificate(s) to My Living Trust

Dear Transfer Agent:

Please be advised that I have prepared a **Trustworthy E-Z Forms™** Revocable Living Trust. I would certainly appreciate your efforts in reissuing the enclosed stock certificate(s) to the trust in the following format. Please insert my name as required:

MYNAME trustee, **TRUSTNAME**, U/T/D dated _____, 19____.
(fill in date of trust)

My name should appear as: _____.

My Trust's name is: _____.

I have endorsed the stock certificate on the reverse side, and have had my signature guaranteed by a commercial bank. Now that the bank has stamped a guarantee on the stock, I am sending the stock to you by registered mail. I find that your institution is named on the front side of the certificate as the transfer agent for the corporation. I realize that in addition to this letter, you may still need to examine or even copy portions of my trust. Please contact me for further information or if there is some problem reissuing this stock. Thank you for your assistance.

Dated: _____, 19_____

Trustor/trustee

_____ (name)

_____ (address)

_____ (city, state, zip)

_____(_____)_____ (phone)

Attn: TRANSFER AGENT FOR

BONDS

(Bond Issuer)

Serial Number(s) _____

Re: Reissuance of Bond(s) to My Living Trust

Dear Transfer Agent or Bond Issuer:

Please be advised that I have prepared a **Trustworthy E-Z Forms™** Revocable Living Trust. I would certainly appreciate your efforts in reissuing the enclosed Bond(s) to the trust in the following format. Either trustee acting as a co-trustee may act alone pursuant to paragraph 1.5. of the trust. Please insert the supplied information as required:

Trustee1 and/or **Trustee2**, trustees of the **TRUST NAME** Trust, U/T/D dated _____, 19 _____.
(fill in date)

Trustee1 is _____

Trustee2 is _____

My trust's name is _____
(fill in name of trust)

I have endorsed the bond on the reverse side, and have had my signature guaranteed by a commercial bank. Now that the bank has stamped a guarantee on the bond, I am sending the bond to you by registered mail. I find that your institution is named on the front side of the certificate as the transfer agent for the issuer. Please contact me for further information or if there is some problem reissuing this bond. Thank you for your assistance.

Dated: _____, 19 _____

Trustor/trustee

(name)

(address)

(city, state, zip)

_____(_____)_____
(phone)

Attn: TRANSFER AGENT FOR

(Bond Issuer) **BONDS**

Re: Reissuance of Bond(s) to My Living Trust

Serial Number(s) _____

Dear Transfer Agent:

Please be advised that I have prepared a **Trustworthy E-Z Forms™** Revocable Living Trust. I would certainly appreciate your efforts in reissuing the enclosed Bond(s) to the trust in the following format inserting my name as required:

MYNAME, trustee of the **TRUSTNAME**, U/T/D dated _____, 19_____.
(fill in date of trust)

My name should appear as: _____.

My Trust's name is: _____.

I have endorsed the bond on the reverse side, and have had my signature guaranteed by a commercial bank. Now that the bank has stamped a guarantee on the bond, I am sending the bond to you by registered mail. I find that your institution is named on the front side of the certificate as the transfer agent for the issuer. I realize that in addition to this letter, you may still need to examine or even copy portions of my trust. Please contact me for further information or if there is some problem reissuing this bond. Thank you for your assistance.

Very truly yours,

Dated: _____, 19_____

Trustor/trustee

_____ (name)

_____ (address)

_____ (city, state, zip)

_____(_____)_____ (phone)

Attn: FUND ADMINISTRATOR FOR:

_____ **FUND**
(Name of Fund or Mutual Fund)

Re: Transfer of Mutual Fund to My Living Trust

Account Number(s) _____

Dear Fund Administrator:

Please be advised that I have prepared a **Trustworthy E-Z Forms™** Revocable Living Trust. I would certainly appreciate your efforts in changing the ownership designation of the my fund or mutual fund account to the following format. Either trustee acting as a co-trustee may act alone pursuant to paragraph 1.5. of the trust. Please insert the supplied information as required.

Trustee1 and/or **Trustee2**, trustee(s) of the "**TRUST NAME**" Trust, U/T/D dated _____, 19_____.
(fill in date)

Trustee1 is _____

Trustee2 is _____

My trust's name is _____
(fill in name of trust)

This is a transfer of the grantor's interest to a Revocable "Inter Vivos" Trust for the grantors' benefit and should not be categorized as a sale exchange for value or other such taxable event (IRC Section 676). Please contact me for further information or if there is some problem transferring this fund. Thank you for your assistance.

Dated: _____, 19_____

Trustor/trustee

_____ (name)

_____ (address)

_____ (city, state, zip)

_____(_____)_____ (phone)

Attn: FUND ADMINISTRATOR FOR:

_____ **FUND**
(Name of Fund or Mutual Fund)

Account number(s) _____

Re: Transfer of Mutual Fund to My Living Trust

Dear Fund Administrator:

Please be advised that I have prepared a **Trustworthy E-Z Forms™** Revocable Living Trust. I would certainly appreciate your efforts in changing the ownership designation of the mutual fund account to the following format inserting my name as required:

MYNAME, trustee of the **TRUSTNAME**, U/T/D dated _____, 19____.

My name should appear as: _____.

My Trust's name is: _____.

This is a transfer of the grantor's interest to a Revocable "Inter Vivos" Trust for the grantor's benefit and should not be categorized as a sale exchange for value or other such taxable event (IRC Section 676). Please contact me for further information or if there is some problem transferring this fund. Thank you for your assistance.

Dated: _____, 19_____

Trustor/trustee

CONSENT TO ASSIGNMENT OF LIMITED PARTNERSHIP INTEREST

The undersigned general partner, duly authorized, and on behalf of the partnership waives the provisions of any partnership agreement which might prevent an assignment of the limited partnership interest, and consents to the foregoing assignment, and approves the admission of the aforementioned trust to the partnership as a substituted limited partner, subject to all terms and conditions of the partnership agreement.

Executed at _____, on _____, 19_____.

GENERAL PARTNER

CONSENT TO ASSIGNMENT OF LIMITED PARTNERSHIP INTEREST-forward with copy of assignment to Managing Partner

_____ (name)

_____ (address)

_____ (city, state, zip)

_____(_____)_____ (phone)

TO: _____ **INSURANCE COMPANY**
(Name of Insurance Company)

Policy Number(s): _____

INSURED'S/ANNUITANT'S NAME: _____

RE: REQUEST FOR CHANGE OF BENEFICIARY OF LIFE INSURANCE or ANNUITY

Gentlemen:

I have prepared a **Trustworthy E-Z Forms™** Revocable Living Trust, and now wish to change the beneficiary designation in order to have benefits paid directly to the trustee of our trust in the event of my death. Kindly return a copy of this form showing an acceptance of the change and effective date for our records. Please change the designation as follows:

FULL NAME OF NEW BENEFICIARY:

The trustee (or successor trustee) of the:

_____ **Trust dated** _____, **19** _____.
(fill in name of trust) (fill in date)

I hereby revoke all designations of beneficiary and all elections of optional settlement methods previously made and subject to the terms of, and subject to changes as provided in the applicable contracts, I hereby designate the above beneficiary.

CERTIFICATION: I hereby certify that the INSURANCE COMPANY shall not be obligated to inquire into the terms of the trust declaration and shall not be charged with knowledge of the terms thereof. Payment to and receipt by the trustees shall fully discharge all liability of said INSURANCE COMPANY to the extent of such payment. I understand that the beneficiary designation shown above does not apply to any Survivor Income coverage I may have (other than a lump sum payment of term or whole life benefits, if any).

Dated: _____, **19** _____

Trustor/trustee (Witness)
Date: _____ **Accepted by:** _____
(Use to transfer Life Insurance Benefits) Authorized Representative (or Employer)

CONSENT TO ASSIGNMENT OF GENERAL PARTNERSHIP INTEREST

The undersigned general partner(s), being the required number of partners of the partnership, waive(s) the provisions of any partnership agreement which might prevent an assignment of the partnership interest assigned, and consent(s) to the foregoing assignment, and approve(s) the admission of the aforesaid Living Trust, to the partnership as a substituted general partner to the extent of the assignment, subject to all terms and conditions of the partnership agreement.

DATED: _____
_____ GENERAL PARTNER

DATED: _____
_____ GENERAL PARTNER

DATED: _____
_____ GENERAL PARTNER

DATED: _____
_____ GENERAL PARTNER

DATED: _____
_____ GENERAL PARTNER