

**TRUST FUNDING LETTER**

TO: \_\_\_\_\_  
(Name of Financial Institution)  
\_\_\_\_\_  
(Address of Financial Institution)  
\_\_\_\_\_

RE: Account Number(s): \_\_\_\_\_  
\_\_\_\_\_

Please transfer the title to all of the above accounts into the name of the REVOCABLE LIVING TRUST named below. Title should be held exactly as follows:

\_\_\_\_\_, Trustee or  
(Your Name)

\_\_\_\_\_, Trustee  
(Your Spouse's Name, if any and if also a Trustee)

Of THE \_\_\_\_\_ TRUST  
(Name of Trust)

TRUST DATE: \_\_\_\_\_  
(Date of Trust)

Because the Trustee(s) of this Trust are also the Grantor(s), no new tax identification number is required and the account name should be reported under the social security number of either trustee, which should be on file. [IRC Reg. Sections 1.671-4(b), 1.6012-3(a)(9), 301-6109-1(a)(2)1.]

**EFFECT ON ACCOUNT:** These transfers should not affect interest, dividends, life insurance or any other income on the investments. If transfers will in any way affect income, dividends or life insurance please contact us prior to making changes. These transfers should also not affect the language on our checks, if a checking account is involved.

**ONE SIGNATURE REQUIRED:** PLEASE NOTE THAT the trust authorizes either trustee to sign alone on any account.

**CAUTION REGARDING TAX-DEFERRED ACCOUNTS:** Do not transfer ownership of IRA or other tax-deferred accounts into the trust.

The account address should:

[ ] Remain the same

[ ] Be changed to: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Trustee (Your Signature)

\_\_\_\_\_  
Trustee (Your Spouse's Name, if any and if also a Trustee)