

Marital Stock Transfer Letter

Subject: Interspousal Stock Transfer Request

Dear [Brokerage/Transfer Agent],

I hereby request the transfer of stock holdings between myself and my spouse as part of our financial planning arrangements.

From: [Your Name]

Account: [Account Number]

To: [Spouse's Name]

Account: [Spouse's Account Number]

Securities to Transfer:

[Company Name] - [Shares] shares

Current market value: approximately \$[Amount]

This transfer is being made between spouses and should qualify for favorable tax treatment under IRC Section 1041. Both parties consent to this transfer.

Please execute this transfer and provide written confirmation to both account holders. We understand any applicable transfer fees will be deducted from the transferring account.

If you need both signatures or additional documentation, please let us know immediately.

Best regards,

[Your Name] and [Spouse's Name]

[Date]

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