

Trust Stock Transfer Letter

Subject: Stock Transfer to Trust Account

Dear [Financial Institution/Transfer Agent],

I am writing to request the transfer of stock holdings from my individual account to my revocable living trust.

Grantor Information:

- Name: [Your Name]
- Current Account: [Account Number]
- SSN: [Number]

Trust Information:

- Trust Name: [Full Trust Name]
- Date Established: [Date]
- Trustee: [Trustee Name]
- Tax ID: [EIN]

Securities to Transfer:

[Detailed list of all stocks with shares, symbols, and approximate values]

This transfer is part of my estate planning strategy and should not trigger any taxable events as I remain the beneficial owner. Please establish a new trust account or transfer to existing trust account number [if applicable].

Enclosed please find:

- Copy of trust agreement
- Trustee certification
- Transfer authorization forms

Please contact me at [Phone] or my attorney [Attorney Name] at [Phone] if you need additional documentation.

Thank you for your assistance.

[Your Name], Grantor and Trustee

[Date]

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