

_____, _____

Attn: Customer Service

_____, _____

RE: Account Number(s): _____

Dear Customer Service:

The purpose of this letter is to request that you transfer the above account(s) to the _____, a revocable living trust. If additional forms are necessary in order to complete the transfer, please forward such forms to the undersigned at your earliest convenience. Thank you for your attention to this matter.

In lieu of providing to you a certified copy of the entire trust document, I make the following declaration:

1. The _____ is in full force and effect and has not been revoked, modified or amended with respect to any of the provisions described in this Letter, including provisions regarding the identity or the powers of the trustee(s).
2. Attached to this Letter and incorporated by this reference are pages of the Trust which evidence the (a) declaration of trust, (b) order of trustees, (c) powers granted to the trustees regarding their ability to purchase and sell securities, and otherwise invest and reinvest trust assets, and (d) signature page.
3. The currently-acting trustee of the trust (all of them, if more than one) have signed this Letter below.
4. I declare that the foregoing statements are true and correct under penalty of perjury.

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Sample Letter Beneficiary Trust Demand For Accounting California

Michal Rosen-Zvi



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