

_____, _____

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 The _____ is in full force and effect and has not been revoked, modified or amended with respect to any of the provisions described in this Letter, including provisions regarding the identity or the powers of the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

G Thomas



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Estate Planning & California Probate Reporter ,1980 **Western Banker** ,1924 *New York State Bar Journal* ,1993 *Report of the National Commission on Diabetes to the Congress of the United States: Supporting materials to the Commission reports* United States. National Commission on Diabetes,1976 **Report of the National Commission on Diabetes to the Congress of the United States: Supporting materials of the Commission reports** United States. National Commission on Diabetes,1976 **Report of the National Commission on Diabetes to the Congress of the United States** United States. National Commission on Diabetes,1975 Estate Planning Review ,1993 Family Foundation Handbook (2009) Jerry J. McCoy,Kathryn W. Miree,2008-09 The Family Foundation Handbook provides comprehensive coverage of the legal tax and business aspects of forming and operating a family foundation From grantmaking to investment management accounting procedures to tax filings and funding the foundation to protecting it from liability this handbook provides coverage of all the issues a family foundation faces This valuable resource provides forms checklists questionnaires training forms and other items to help provide the professional assistance every foundation needs **Monthly Catalog of United States Government Publications** ,1975 **Report of the National Commission on Diabetes to the Congress of the United States. v. 4 6** ,1976 Mergers, Acquisitions, and Buyouts Martin D. Ginsburg,2003 Congressional Record United States. Congress,1990-06-11 The Congressional Record is the official record of the proceedings and debates of the United States Congress It is published daily when Congress is in session The Congressional Record began publication in 1873 Debates for sessions prior to 1873 are recorded in The Debates and Proceedings in the Congress of the United States 1789 1824 the Register of Debates in Congress 1824 1837 and the Congressional Globe 1833 1873 *The National Underwriter* ,1933 **Bulletin of the Atomic Scientists** ,1969-02 The Bulletin of the Atomic Scientists is the premier public resource on scientific and technological developments that impact global security Founded by Manhattan Project Scientists the Bulletin s iconic Doomsday Clock stimulates solutions for a safer world **National Underwriter** ,1933 *ACTEC Notes* ,1990 **The Wall Street Journal** ,1984 **Bowker's Law Books and Serials in Print** ,1984 *Moore's Rural New Yorker* ,1935 **Suggested Forms for Wills and Trusts** United California Bank. Trust Department,1963

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