

Letter Requesting Transfer to Trust

Dear Sir or Madam:

This is to inform you that I intend to transfer the property described herein to _____ ("Trust"). This Trust is a _____ Trust. The undersigned is the Grantor and sole beneficiary.

Please acknowledge receipt of this letter and confirm that the intended transfer will not cause any undue adverse effect. Please indicate your consent to the above transfer without any negative effect by signing and dating the enclosed copy of this letter and returning it to me in the enclosed envelope.

If I do not receive your reply objecting to the proposed transfer within thirty days from the above date, I will assume that you consent to the transfer and that there will not be an adverse effect from this transfer.

If you need me to fill out forms for your organization, please forward them to me at the address on this letterhead and I will do so immediately.

Thank you for your attention to this matter.

Grantor

Date:

Acknowledgment: _____

Enc. Second copy of letter for signature; self-addressed stamped envelope for return.

Letter Requesting Transfer to Trust Review List

This review list is provided to inform you about this document in question and assist you in its preparation. Adapt this letter to fit the circumstances of the various parties you must contact to collect your assets, have them properly transferred to your new trust, and be prepared to follow-up diligently to be sure all of the paperwork is in order. This is a serious and extended task. Do not enter into it lightly or expect it to go smoothly. You have just entered administrative hell....

1. Set up a file for follow-up on all of these transactions. Keep separate copies in each specific transaction file but also in the general file.
2. Follow-up by phone within 14 days of sending out each letter, if you have not heard back.
3. If you decide to revoke your Trust at any time, use the same approach in reverse.