BILL OF TRANSFER
AND NOTICE OF ASSIGNMENT

The undersigned, as Grantors of The John Doe and Jane Doe Living Trust, hereby transfer and assign to John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Living Trust, all of our rights, title and interest in the assets described below:

[This section varies based upon what type of property you include in your Living Trust.]

A. <u>The following shared property</u>:

The real property located at:

- 123 Main Street
  Chicago, Illinois 60629
  Type of Property: Home

The following financial accounts:

- XYZ Bank
  Account Number: 5555555555
  Account Type: Checking

The following additional property:

- All personal property, including but not limited to jewelry, household furniture and furnishings, clothes and other personal items

B. <u>The following separate property of John Doe</u>:

Proceeds from the following retirement accounts:

- XYZ Retirement Company, Annuity
  Account Number: 55555555555

The following additional property:

- All personal property, including but not limited to jewelry, household furniture and furnishings, clothes and other personal items

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C. The following separate property of Jane Doe:

Proceeds from the following retirement accounts:

- XYZ Retirement Company, Annuity
  Account Number: 33333333333

The following additional property:

- All personal property, including but not limited to jewelry, household furniture and furnishings, clothes and other personal items

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IN WITNESS WHEREOF, the undersigned have executed this Bill of Transfer and Notice of Assignment on the date below.

_____
Signature of John Doe, as Grantor

Date: _____

_____
Signature of Jane Doe, as Grantor

Date: _____

_____
Signature of John Doe, as Trustee of The John Doe and Jane Doe Living Trust

Date: _____

_____
Signature of Jane Doe, as Trustee of The John Doe and Jane Doe Living Trust

Date: _____

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[This document only appears if you are transferring a financial account to your trust.]

FINANCIAL ACCOUNT TRANSFER TO TRUST

To: XYZ Bank

Re: Checking Account Number(s): 5555555555

Ladies and Gentlemen:

Please be advised that we are the grantors of a living trust and have transferred all of our rights, title and interest in the above-referenced account(s) to John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Living Trust.

Please make note of this transfer and update your records such that the above-referenced account(s) is/are registered in the name of "John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Living Trust." Please do not change the account number(s).

Sincerely,

_____
Signature of John Doe

Date: _____

_____
Signature of Jane Doe

Date: _____

123 Main Street
Chicago, Illinois 60629

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[This document only appears if you want to include proceeds of your retirement account in your trust.]

REQUEST TO CHANGE BENEFICIARY FOR RETIREMENT ACCOUNT

To: XYZ Retirement Company

Re: Annuity
Account Number: 55555555555

Ladies and Gentlemen:

Please be advised that I am the Grantor of a living trust and would like to make the living trust the beneficiary of my retirement account.

Please make "John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Living Trust" the beneficiary of my policy.

Sincerely,

_____
Signature of John Doe

Date: _____

123 Main Street
Chicago, Illinois 60629

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[This document only appears if you want to include proceeds of your retirement account in your trust.]

REQUEST TO CHANGE BENEFICIARY FOR RETIREMENT ACCOUNT

To: XYZ Retirement Company

Re: Annuity
Account Number: 33333333333

Ladies and Gentlemen:

Please be advised that I am the Grantor of a living trust and would like to make the living trust the beneficiary of my retirement account.

Please make "John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Living Trust" the beneficiary of my policy.

Sincerely,

_____
Signature of Jane Doe

Date: _____

123 Main Street
Chicago, Illinois 60629

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