BILL OF TRANSFER
AND NOTICE OF ASSIGNMENT

The undersigned, as Grantors of The John Doe and Jane Doe Joint Living Trust, hereby transfer and assign to John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Joint 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:

- 100 Main Street
  [CITY], [STATE] [ZIP]
  Type of Property: Home

The funds in the following bank accounts:

- XYZ Bank
  100 Main Street
  [CITY], [STATE] [ZIP]
  Account Number: 9999999999
  Type: Checking

The cash, funds and securities in the following brokerage accounts:

- XYZ Brokerage
  100 Main Street
  [CITY], [STATE] [ZIP]
  Account Number: 9999999999

The following non-real estate contracts:

- XYZ Contract
  Entered into with Jean Doe
  Dated: January 1, 2001

Proceeds from the following annuity/life insurance policies:

- XYZ Life Insurance Company, Description of Policy
  Policy Number: 9999999999

legalzoom.com
SAMPLE

The following certificated stocks and/or bonds:

- 100 shares of stock issued by XYZ Corporation
  Certificate Number: 9999999999

The following partnership interests:

- Description of Partnership interest in XYZ Partnership

The following business interests:

- Description of interest in XYZ Business

The following additional property:

- Shelby Cobra
- Boat
- The painting of a dog on a red blanket

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

The funds in the following bank accounts:

- ABC Bank
  100 Main Street
  [CITY], [STATE] [ZIP]
  Account Number: 9999999999
  Type: Checking

The cash, funds and securities in the following brokerage accounts:

- XYZ Financial Company
  100 Main Street
  [CITY], [STATE] [ZIP]
  Account Number: 9999999999

The following non-real estate contracts:

- MNO Contract
  Entered into with David Doe
  Dated: January 1, 2001

legalzoom.com®
SAMPLE

Proceeds from the following annuity/life insurance policies:

- XYZ Life Insurance Company, Description of Policy
  Policy Number: 9999999999

The following certificated stocks and/or bonds:

- 100 shares of stock issued by XYZ Corporation
  Certificate Number: 9999999999

The following partnership interests:

- Description of Partnership interest in XYZ Partnership

The following business interests:

- Description of interest in XYZ Business

The following additional property:

- 100 gold coins
- Gun collection

C. <u>The following separate property of Jane Doe</u>:

The funds in the following bank accounts:

- DEF Bank
  100 Main Street
  [CITY], [STATE] [ZIP]
  Account Number: 9999999999
  Type: Savings

The cash, funds and securities in the following brokerage accounts:

- XYZ Mutual Fund
  100 Main Street
  [CITY], [STATE] [ZIP]
  Account Number: 9999999999

legalzoom.com®
SAMPLE

The following non-real estate contracts:

- ABC Contract
  Entered into with Julie Doe
  Dated: January 1, 2001

Proceeds from the following annuity/life insurance policies:

- XYZ Life Insurance Company, Description of Policy
  Policy Number: 9999999999

The following certificated stocks and/or bonds:

- 100 shares of stock issued by XYZ Corporation
  Certificate Number: 9999999999

The following partnership interests:

- Description of Partnership interest in XYZ Partnership

The following business interests:

- Description of interest in XYZ Business

The following additional property:

- 100 silver coins
- Art work

LegalZoom.com®
SAMPLE

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
Joint Living Trust

Date: _____

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

Date: _____

legalzoom.com®
SAMPLE

[This document only appears if you are transferring a bank account to your trust:]

BANK ACCOUNT TRANSFER TO TRUST

To: XYZ Bank
100 Main Street
[CITY], [STATE] [ZIP]

Re: Checking Account Number: 9999999999

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 to John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Joint Living Trust.

Please make note of this transfer and update your records such that the above-referenced account is registered in the name of "John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Joint Living Trust."

Sincerely,

_____
Signature of John Doe

Date: _____

_____
Signature of Jane Doe

Date: _____

100 Main Street
[CITY], [STATE] 64101

legalzoom.com
SAMPLE

[This document only appears if you are transferring a brokerage account to your trust:]

BROKERAGE/FINANCIAL ACCOUNT TRANSFER TO TRUST

To: XYZ Brokerage
100 Main Street
[CITY], [STATE] [ZIP]

Re: Account Number: 9999999999

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 to John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Joint Living Trust.

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

Sincerely,

_____
Signature of John Doe

Date: _____

_____
Signature of Jane Doe

Date: _____

100 Main Street
[CITY], [STATE] 64101

legalzoom® .com
SAMPLE

[This document appears if you are transferring a non-real estate contract to your trust:]

ASSIGNMENT OF CONTRACT TO TRUST

KNOWN BY ALL THESE PRESENT:

FOR VALUE RECEIVED, the undersigned, as Grantors of The John Doe and Jane Doe Joint Living Trust, hereby assign to John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Joint Living Trust, all of our rights, title and interest in the contract described below:

Title of Contract: XYZ Contract
Entered into with: Jean Doe
Dated: January 1, 2001

IN WITNESS WHEREOF, the undersigned have executed this Assignment of Contract to Trust on the date below.

_____
Signature of John Doe, as Grantor

Date: _____

_____
Signature of Jane Doe, as Grantor

Date: _____

The Transferees of the above-referenced contract interests hereby agree, effective upon the transfer of such contract interests, to be bound by the terms of any applicable agreement relating to the contract, as may be amended, as if the Transferees have signed such agreement and were a party thereto.

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

Date: _____

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

Date: _____

legalzoom.com®
SAMPLE

[This document only appears if you want to include proceeds of your life insurance in your trust:]

REQUEST TO CHANGE BENEFICIARY

To: XYZ Life Insurance Company

_____
(Address)

_____
(City, State, Zip)

Re: Description of Policy
Policy Number: 9999999999

Ladies and Gentlemen:

Please be advised that we are the grantors of a living trust and would like to make the living trust the beneficiary of our life insurance policy or annuity contract, as the case may be.

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

Sincerely,

_____
Signature of John Doe

Date: _____

_____
Signature of Jane Doe

Date: _____

100 Main Street
[CITY], [STATE] 64101

legalzoom® .com
SAMPLE

[This document, along with the Power of Attorney for Securities Transfers, only appears if you are transferring stocks to your trust:]

REQUEST FOR RE-ISSUANCE OF CERTIFICATE

To: _____

_____
(Street Address)

_____
(City, State, Zip)

Re: Number of Shares: _____
Security: Stock issued by XYZ Corporation
Certificate Number: 9999999999

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 security to John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Joint Living Trust.

Please make note of this transfer and re-issue the above-captioned certificate in the name of "John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Joint Living Trust." We have attached the original certificate and signed a Power of Attorney for Securities Transfer.

Sincerely,

_____
Signature of John Doe

Date: _____

_____
Signature of Jane Doe

Date: _____

100 Main Street
[CITY], [STATE] 64101

legalzoom.com®
SAMPLE

POWER OF ATTORNEY FOR SECURITIES TRANSFER

KNOWN ALL BY THESE PRESENT:

FOR VALUE RECEIVED, We hereby assign and transfer unto John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Joint Living Trust, the following securities:

Number of Shares: 100
Security: Stock issued by XYZ Corporation,

as represented by the attached certificate, and do hereby irrevocably constitute and appoint _____ as attorney-in-fact to transfer the said securities on the book of the said entity with full power of substitution in the premises.

IN WITNESS WHEREOF, the undersigned have executed this Power of Attorney for Securities Transfer on the date below.

_____
Signature of John Doe

Date: _____

_____
Signature of Jane Doe

Date: _____

SAMPLE
LegalZoom®.com

[This document appears only if you are transferring a partnership interest to your trust:]

ASSIGNMENT OF PARTNERSHIP INTERESTS

KNOWN BY ALL THESE PRESENT:

FOR VALUE RECEIVED, the undersigned transferors hereby assign and transfer unto John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Joint Living Trust (the "Transferee"), all of our rights and title to the partnership interests in XYZ Partnership, consisting of a _____% Description of Partnership interest. If applicable, we attach the certificate representing our interest in the partnership.

IN WITNESS WHEREOF, the undersigned have executed this assignment of Partnership Interests on the date below.

_____
Signature of John Doe

Date: _____

_____
Signature of Jane Doe

Date: _____

The Transferees of the above-referenced partnership interests hereby agree, effective upon the transfer of such partnership interests, to be bound by the terms of the partnership agreement relating to XYZ Partnership, as may be amended, as if the Transferees have signed the partnership agreement and were a party thereto.

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

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

Date: _____

legalzoom.com
SAMPLE

[This document appears only if you are transferring a business interest to your trust:]

ASSIGNMENT OF BUSINESS INTERESTS

KNOWN BY ALL THESE PRESENT:

FOR VALUE RECEIVED, the undersigned transferors hereby assign and transfer unto John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Joint Living Trust ("the Transferee"), all of our rights and title to XYZ Business, consisting of a _____% Description of interest. If applicable, we attach the certificate representing our interest in the business.

IN WITNESS WHEREOF, the undersigned have executed this Assignment of Business Interests on the date below.

_____
Signature of John Doe

Date: _____

_____
Signature of Jane Doe

Date: _____

The Transferees of the above-referenced business interests hereby agree, effective upon the transfer of such business interests, to be bound by the terms of any applicable agreement relating to the business, as may be amended, as if the Transferees have signed such agreement and were a party thereto.

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

Date: _____

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

Date: _____

legalzoom.com
SAMPLE