# 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:

- 100 Main Street
  Denver, Colorado 80201
  Type of Property: Home

The funds in the following bank accounts:

- XYZ Bank
  100 Main Street
  Denver, Colorado 80201
  Account Number: 9999999999
  Type: Checking

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

- XYZ Brokerage
  100 Main Street
  Denver, Colorado 80201
  Account Number: 9999999999

The following non-real estate contracts:

- XYZ Contract
  Entered into with Jean Doe
  Dated: January 1, 2014

Proceeds from the following life insurance policies:

- XYZ Life Insurance Company, Whole Life
  Policy Number: 9999999999

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B. The following separate property of John Doe:

- ABC Bank
  100 Main Street
  Denver, Colorado 80201
  Account Number: 9999999999
  Type: Checking

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

- XYZ Brokerage
  100 Main Street
  Denver, Colorado 80201
  Account Number: 9999999999

The following non-real estate contracts:

- XYZ Contract
  Entered into with Jean Doe
  Dated: January 1, 2014

Proceeds from the following life insurance policies:

- XYZ Life Insurance Company, Whole Life
  Policy Number: 9999999999

C. The following separate property of Jane Doe:

The funds in the following bank accounts:

- DEF Bank
  100 Main Street
  Denver, Colorado 80201
  Account Number: 9999999999
  Type: Savings

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

- XYZ Mutual Fund
  100 Main Street
  Denver, Colorado 80201
  Account Number: 9999999999

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The following non-real estate contracts:

- ABC Contract
  Entered into with Julie Doe
  Dated: January 1, 2014

Proceeds from the following life insurance policies:

- XYZ Life Insurance Company, Whole Life
  Policy Number: 9999999999

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**IN WITNESS WHEREOF**, the undersigned has 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 bank account to your trust:]**

**FINANCIAL ACCOUNT TRANSFER TO TRUST**

To: ABC Bank
100 Main Street
Denver, Colorado 80201

**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 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 Living Trust." Please do not change the account number.

Sincerely,

_____
Signature of John Doe

Date: _____

_____
Signature of Jane Doe

Date: _____

100 Main Street
Denver, Colorado 80201

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**[This document appears if you are transferring a contract interest to your trust.]**

## ASSIGNMENT OF CONTRACT TO TRUST

KNOWN BY ALL THESE PRESENT:

FOR VALUE RECEIVED, We, the undersigned, as Grantors of The John Doe and Jane Doe Living Trust, hereby assign and transfer 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 contracts described below:

**Title of Contract:** XYZ Contract
**Entered into with:** Ann Smith
**Dated:** January 1, 2014

**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 had signed such agreement and was a party thereto.

_____
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, 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: XYZ Corporation
100 Main Street
Denver, Colorado 80201

**Re: Number of Shares:** 100
**Security:** Shares of Common 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 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 Living Trust." We have attached the original certificate and a signed Power of Attorney for Securities Transfer.

Sincerely,

_____
Signature of John Doe

Date: _____

_____
Signature of Jane Doe

Date: _____

100 Main Street
Denver, Colorado 80201

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**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 Living Trust, the following securities:

**Number of Shares:** 100
**Security:** Shares of Common 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 books of the said corporation 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: _____

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

**REQUEST TO CHANGE BENEFICIARY FOR LIFE INSURANCE**

To: XYZ Life Insurance Company

**Re:** Whole Life
**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.

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

Sincerely,

_____
Signature of John Doe

Date: _____

_____
Signature of Jane Doe

Date: _____

100 Main Street
Denver, Colorado 80201

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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: ABC Company

**Re:** Annuity
**Account Number:** 9999999998

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 retirement account.

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

Sincerely,

_____
Signature of John Doe

Date: _____

_____
Signature of Jane Doe

Date: _____

100 Main Street
Denver, Colorado 80201

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**[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, We, the undersigned transferors hereby assign and transfer unto John Doe and Jane Doe, as Trustees of The John Doe and Jane Doe Living Trust (the "Transferee"), all of our rights and title to LMN Business, consisting of a 100% sole proprietorship 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, as Grantor

Date: _____

_____
Signature of Jane Doe, as Grantor

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 had signed such agreement and was a party thereto.

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

Date: _____

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

Date: _____

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