

[Your Name]
[Your Address]
[City, State, Zip Code]
[Your Phone Number]
[Your Email Address]

[Date]

[Recipient Name or Financial Institution]
[Department Name, if applicable]
[Address]
[City, State, Zip Code]

RE: Request for Asset Transfer Documentation - [Name of Trust]

To Whom It May Concern,

I am writing to you in my capacity as [Successor Trustee / Beneficiary / Authorized Representative] of the **[Full Name of Trust]**, established on **[Date Trust was Created]**.

I am formally requesting a complete set of documentation and requirements necessary to transfer the following assets currently held by your institution into the name of the Trust:

- **Asset Description:** [e.g., Bank Account Number, Brokerage Account, or Property Address]
- **Current Owner of Record:** [Name currently on the account/title]

Specifically, please provide the following:

1. The specific transfer forms or change of ownership applications required by your institution.
2. A list of any necessary supporting documents (e.g., Certificate of Trust, Death Certificate, or Letter of Testamentary).
3. Instructions regarding required signatures (e.g., Notary Public or Medallion Signature Guarantee).
4. The mailing address or secure portal where the completed documents should be submitted.

Please find attached a copy of the [Certificate of Trust / Grant Deed] for your records to verify my authority regarding this matter.

If you have any questions or require further information, please contact me directly at [Your Phone Number] or [Your Email Address]. Thank you for your prompt assistance in this matter.

Sincerely,

[Your Signature]

[Your Printed Name]