

[Your Name/Trustee Name]

[Address Line 1]

[Address Line 2]

[Phone Number]

[Email Address]

[Date]

[Recipient Name or Department]

[Institution Name]

[Address Line 1]

[Address Line 2]

**RE: Formal Instruction for Transfer of Trust Assets - Account Number: [Account Number]**

To Whom It May Concern,

I am writing to you in my capacity as [Trustee/Authorized Signatory] of the [Full Name of Trust], established on [Date of Trust Agreement].

Pursuant to the terms of the Trust, I hereby formally instruct [Institution Name] to transfer the following assets currently held in the above-referenced account:

- **Asset Description:** [Description, e.g., Cash, Stock Tickers, Fund Names]
- **Quantity/Amount:** [Specific Amount or "All Assets"]

Please transfer these assets to the following receiving institution:

- **Receiving Institution Name:** [New Institution Name]
- **Account Title:** [Full Name of the Receiving Account]
- **Account Number:** [New Account Number]
- **Routing/DTC Number:** [Routing/DTC Number]
- **Reference:** [Additional Transfer Reference/Memo]

Please execute this transfer [Immediately / On Date: MM/DD/YYYY]. I have attached a copy of the [Certificate of Trust / Relevant Trust Pages] as proof of my authority to direct these assets.

Kindly confirm in writing once the transfer has been initiated. Should you require any additional documentation or have questions regarding this request, please contact me directly at [Phone Number].

Sincerely,

[Signature]

[Printed Name]  
Trustee, [Full Name of Trust]