

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

[Date]

[Name of Transfer Agent]
[Attn: Shareholder Services]
[Address]
[City, State, Zip Code]

RE: Instruction to Transfer Securities to Inter Vivos Trust

To Whom It May Concern:

Please accept this letter as my formal instruction to transfer the following securities currently held in my name into my inter vivos trust.

Security Description:

Issuer Name: [Company Name]
Account Number: [Your Account Number]
Number of Shares/Units: [Number of Shares or "All Shares"]
Certificate Numbers (if applicable): [List Numbers or "Book Entry"]

New Registration Information:

Please register the above-mentioned securities as follows:
[Name of Trustee(s)], Trustee(s), or their successors in trust, under the [Full Name of Trust], dated [Date of Trust Agreement], and any amendments thereto.

Taxpayer Identification Number:

The Social Security Number or Employer Identification Number (EIN) associated with this trust is: [SSN or EIN].

Enclosed please find the following documents to facilitate this transfer:

1. [Stock Power Form with Medallion Signature Guarantee]
2. [Original Stock Certificates, if applicable]
3. [Certification of Trust or relevant excerpts of the Trust Agreement]
4. [W-9 Form for the Trust]

Once the transfer is complete, please send the new statement or confirmation to the address listed above.

Sincerely,

[Your Signature]

[Your Printed Name]