Date: [Date]

To: [Brokerage Firm Name]
Attn: Transfers Department / My Account Representative
[Brokerage Firm Address]
[City, State, Zip Code]

RE: Letter of Instruction for Transfer of Assets

Current Account Number: [Current Account Number]

Current Account Registration: [Your Name / Joint Names]

To Whom It May Concern,

Please accept this letter as my formal instruction to transfer the following assets from my individual/joint account referenced above into my Revocable Living Trust.

Option 1: Full Transfer
Please transfer ALL securities and cash held in the above-referenced account to the new account established in the name of the Trust.

Option 2: Partial Transfer
Please transfer only the following specific assets:
- [Asset Name / Ticker]: [Number of Shares/Amount]
- [Asset Name / Ticker]: [Number of Shares/Amount]

The new account registration should be as follows:

Trust Name: [The Name of Your Trust, e.g., The John Doe Revocable Trust]
Trust Date: [Date the Trust was signed]
Trustees: [Name of Trustee(s)]
Tax ID / SSN: [Your Social Security Number or Trust EIN]

I have attached a copy of the Certificate of Trust (or relevant pages of the Trust Agreement) and the completed new account application forms as required by your firm.

Please notify me once this transfer has been completed. Thank you for your prompt attention to this matter.

Sincerely,

_____
[Your Printed Name]
[Your Phone Number]

_____
[Joint Owner Printed Name, if applicable]

[Note: Most brokerages require a Medallion Signature Guarantee for this request. Do not sign until you are in the presence of an authorized official at a bank or brokerage.]