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

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

RE: Letter of Instruction for Securities Transfer
Account Number: [Enter Account Number]
Account Name: [Enter Current Trust Name]

To Whom It May Concern,

Please accept this letter as formal instruction to transfer the authority and title of the above-referenced account. Due to the [death/resignation/incapacity] of the previous Trustee, [Name of Former Trustee], I have assumed the role of Successor Trustee as outlined in the [Name of Trust] dated [Date of Trust].

I am requesting that you update your records to reflect the following information for the account:

Successor Trustee Name: [Your Full Legal Name]
Taxpayer Identification Number (TIN/SSN): [Enter Number]

Enclosed with this letter, please find the following supporting documentation:

- Certified copy of the Certificate of Trust or Trust Agreement.
- Certified copy of the Death Certificate (if applicable).
- Proof of identity (e.g., copy of Driver's License).
- [Any specific forms required by the brokerage firm].

Please contact me at [Your Phone Number] or [Your Email Address] should you require any additional information or specific internal forms to complete this transfer. Please provide written confirmation once the account title and records have been successfully updated.

Thank you for your prompt attention to this matter.

Sincerely,

_____
[Your Signature]

[Your Printed Name]
Successor Trustee