|  |  |
| --- | --- |
| From:  Original-Beneficiary: Name  c/o 1234 Your Address Street  City / Town, State [12345]  Phone No.: (xxx) xxx-xxxx  **Beneficiary** | To:  Succeeding-Beneficiary: Name  c/o 1234 Their Address Street  City / Town, State [54321]  **Respondent / Succeeding Beneficiary** |

Date: \_\_\_\_\_\_Date Goes Here\_\_\_\_\_\_

**NOTICE OF TRANSFER OF EQUITABLE OWNERSHIP**

Dear Succeeding-Beneficiary: Name,

This letter is to inform you of my desire concerning the transfer of my equitable ownership in the Trust Name Here.

Should you accept, please transfer my Units of Equitable Ownership in the following manner:

Send to me, the current Beneficiary, your response to this Notice of Transfer of Equitable Ownership stating your consent to accept equitable ownership as Beneficiary with regards to the above-named Trust within thirty **(30)** days of your receipt of this Notice. After your response has been received, I will present the original Certificate of Equitable Ownership and our correspondence to the Board of Trustees for the issuance of a new Certificate caused to be sent to you. They will also convene to record your receipt of my Units of Equitable Ownership in a Minute of this Trust. Said equitable ownership shall also transfer upon my termination or resignation as Beneficiary from this Trust for any reason.

Thank you very much.

Sincerely,

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Original-Beneficiary: Name, Beneficiary

**WITNESSES**

On the date which it bears, I am signing as a witness at his/her request. At the time he/she signed this letter, he/she appeared to be of sound and disposing mind and memory and not acting under duress, menace, or undue influence of any person whatsoever.

Hold harmless clause: I am not a party to the papers for which I am a witness.

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Witness Printed Name

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Witness Printed Name