



# Declaration of Revocable Trust

- ✓ Use this form to change an account ownership registration to a Revocable Trust; which allows you to designate a beneficiary.
- ✓ Use a separate form for each certificate.
- ✓ A Trusteed Beneficiary is the only beneficiary option available for:
  - Single Pay (0000)    Series 15A (0420)    Series 15 (0150/0710)
  - I-76 (0220)        Series 10 (0220/0810)    Series 22A (0220)
- ✓ Any certificate product owned by a Louisiana resident.

Certificate Number

	001
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**The use of this Declaration of Revocable Trust and the existence of a trust under applicable law are matters which should be discussed with settlor's attorney.**

## Part 1 Client Information

Certificate Owner Name

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## Part 2 Beneficiary Information

The beneficiary of this trust is:

Select One

Individual Name Date of Birth (MMDDYYYY)

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Organization Name

Trust Name

Date of Trust (MMDDYYYY)

Relationship to Certificate Holder/Owner

Address

City State    Zip Code

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**Part 3** Owner's Marital Status and Consent of Spouse

Select Owner's Marital Status

Single  Married\* (See Consent of Spouse)  Widowed  Divorced

Indicate current state of residence

**\*Consent of Spouse**

**This consent of spouse must be signed if all of the following conditions are present:**

- (a) the spouse of the owner is living,
- (b) is not the sole primary beneficiary named and
- (c) the owner and spouse are residents of a community property state (Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, Wisconsin).

I have reviewed the above beneficiary designation and, as the spouse of the owner, I consent to the beneficiary designation and all contributions of money or property to be used for the purchase of such accounts to be issued in my spouse's name, whether heretofore, now or hereafter and I relinquish all my statutory or other rights thereto.

Spouse Name

Spouse Signature

X \_\_\_\_\_

Date (MMDDYYYY)

**Part 4** Acknowledgement and Signature

I, the undersigned Settlor and the owner of the Certificate described in Part 1, in my individual capacity and desiring to establish a revocable trust, declare myself trustee of such Certificate, which I contemporaneously herewith earmark for, assign and deliver to this trust. As trustee I acknowledge receipt of such Certificate and I shall have the right to accept contributions of money to this trust. The use of any sums of money by me for the purpose of this trust shall constitute conclusive evidence of the earmarking and delivery of such sums to this trust.

- A. The beneficiary of the trust is the sole person or entity named in Part 2 whose interest in the trust property is presently vested subject to divestment only by revocation, termination of the trust prior to my death, or change of beneficiary under Paragraph C herein. Upon my death all title to the trust property, including any monies earmarked for this trust, shall pass to the beneficiary.
- B. As trustee I undertake to hold, manage and administer said trust property, and all additions thereto, in accordance with the terms and conditions of this Declaration of Revocable Trust. The certificate initially constituting the trust property shall be held by me as trustee for the beneficiary of this trust and if necessary reissued in my name as trustee for the beneficiary of this trust. All sums of money which may be contributed to the trust shall be used to make payments upon such Certificate, and as trustee I shall have the power to exercise all rights and privileges provided for in such Certificate.
- C. As settlor I reserve the right to change the beneficiary or to revoke this trust in whole or in part, but no change of beneficiary or revocation shall be effective as to the issuer of the Certificate until written notice thereof in form acceptable to such issuer executed by me, is received by the issuer at its principal place of business and confirmation thereof is given by such issuer. A request from me, whether written, telephonic or otherwise, so long as it is in form acceptable to the issuer, for surrender of the Certificate, in whole or in part, held by the trust, whether by installment payments or otherwise, shall constitute a revocation of this trust to the extent of such surrender, but such revocation shall not be effective as to the issuer of the Certificate held by the trust until such request is received by the issuer at its principal place of business. The death or termination of the legal existence of the beneficiary prior to my death shall terminate this trust. Upon revocation of the trust or the death or termination of the legal existence of the beneficiary, all trust property shall revert to me in my individual capacity.
- D. The issuer of the Certificate and Ameriprise Financial Services, Inc. shall be fully released and discharged from any liability arising out of any act of payment, distribution, registration, transfer, loan, or any other act done or omitted to be done in reliance upon the terms of this instrument or any instruction from me as settlor or trustee and the provisions of this Paragraph D shall be binding upon my heirs, legatees and representatives.

Certificate Owner Name

Certificate Owner Signature

X \_\_\_\_\_

Date (MMDDYYYY)