

**FINANCIAL ACCOUNT TRANSFER TO TRUST**

To:

THIS Assignment, is being made on this the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, by \_\_\_\_\_, \_\_\_\_\_ County, State of Pennsylvania, as the Assignor(s), whether one or more, and \_\_\_\_\_, as Trustee of THE \_\_\_\_\_ REVOCABLE TRUST dated \_\_\_\_\_, as the Assignee.

Assignor(s) do hereby assign, convey, and deliver to the Assignee all of the Assignor's right, title, and interest in and to the following described property:

- Checking Account No(s): at .
- Checking Account No(s): at .
- Savings Account No(s): at .
- Savings Account No(s): at .
- Account No(s): at .
- Account No(s): at .
- Account No(s): at .
- Brokerage Account No(s): at .

This assignment includes, but is not limited to, all cash and securities held in said Accounts.

These account shall hereafter be titled in the name of \_\_\_\_\_, as Trustee of THE \_\_\_\_\_ REVOCABLE LIVING TRUST, with an address of \_\_\_\_\_.

TO HAVE AND TO HOLD unto the Trustee and his or her successors and assigns forever.

DATED this the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Trustor Signature  
Print Name: \_\_\_\_\_

\_\_\_\_\_  
Trustor Signature  
Print Name: \_\_\_\_\_

STATE OF PENNSYLVANIA

COUNTY OF \_\_\_\_\_

On this, the \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_, before me  
\_\_\_\_\_, the undersigned officer, personally  
appeared \_\_\_\_\_, known to me (or satisfactorily proven)  
to be the person whose name \_\_\_\_\_ subscribed to the within instrument,  
and acknowledged that \_\_\_\_\_ (he/she/they) executed the same for the  
purposes therein contained.

In witness whereof, I hereunto set my hand and official seal.

\_\_\_\_\_  
Notary Public

Printed Name: \_\_\_\_\_

My Commission Expires:

\_\_\_\_\_