

**THE JOHN A. DOE AND JANE B. DOE
REVOCABLE LIVING TRUST AGREEMENT**

Declaration of Intent

The undersigned hereby declare that as Trustees of **THE JOHN A. DOE AND JANE B. DOE REVOCABLE LIVING TRUST**, they are acquiring and will hold in the name of **JOHN A. DOE AND JANE B. DOE**, but without further reference to their fiduciary capacity, all items listed on the attached schedule(s) hereto and incorporated herein as amended, from time to time, as well as household furnishings, automobiles, jewelry, bank accounts, securities, bonds, clothing and other personal property of any kind in their name or in either of their names and henceforth such assets shall and will belong to said Trust and not to them individually; and they further hereby declare that, except to the extent of interest provided to them under the terms and provisions of said Trust, they have no personal interest in any of the above itemized personal properties, it being intended that this Declaration constitutes an affirmation of Trust ownership and an assignment to this Trust and shall be binding on their heirs, administrators, executors and assigns.

IN WITNESS WHEREOF, the undersigned have executed this instrument this ____ day
of _____.

JOHN A. DOE,
Trustor/Trustee

JANE B. DOE,
Trustor/Trustee

STATE OF TEXAS

COUNTY OF ANYCOUNTY

BEFORE ME, the undersigned authority, on this day personally appeared JOHN A. DOE AND JANE B. DOE, known to me to be the persons whose names are subscribed to the foregoing instrument, and acknowledged to me that they executed the same for the purposes and consideration therein expressed and in the capacity therein stated.

SUBSCRIBED AND SWORN this ____ day of _____, _____.

Notary Public, State of Texas

SEPARATE PROPERTY LISTING
OF JOHN A. DOE

The following items are the separate property of JOHN A. DOE, either by operation of law or by agreement of both spouses:

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____
- 6 _____
- 7 _____
- 8 _____
- 9 _____
- 10 _____
- 11 _____
- 12 _____
- 13 _____
- 14 _____
- 15 _____
- 16 _____
- 17 _____
- 18 _____
- 19 _____
- 20 _____
- 21 _____

SEPARATE PROPERTY LISTING

- 22 _____
- 23 _____
- 24 _____
- 25 _____
- 26 _____
- 27 _____
- 28 _____
- 29 _____
- 30 _____
- 31 _____
- 32 _____
- 33 _____
- 34 _____
- 35 _____
- 36 _____
- 37 _____
- 38 _____
- 39 _____
- 40 _____

Signed this _____ day of _____, 20____.

JOHN A. DOE, Declarant

Approved and accepted this _____ day of _____, 20____.

JANE B. DOE, Spouse

STATE OF TEXAS

COUNTY OF ANYCOUNTY

On this the _____ day of _____, 20____, before me, a Notary Public, personally appeared JOHN A. DOE AND JANE B. DOE, personally known to me to be the persons whose names are subscribed to this instrument, and acknowledged that they executed it for the purposes herein expressed.

Notary Public, State of Texas

SEPARATE PROPERTY LISTING

OF JANE B. DOE

The following items are the separate property of JANE B. DOE, either by operation of law or by agreement of both spouses:

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____
- 6 _____
- 7 _____
- 8 _____
- 9 _____
- 10 _____
- 11 _____
- 12 _____
- 13 _____
- 14 _____
- 15 _____
- 16 _____
- 17 _____
- 18 _____
- 19 _____
- 20 _____
- 21 _____

SEPARATE PROPERTY LISTING

22 _____
23 _____
24 _____
25 _____
26 _____
27 _____
28 _____
29 _____
30 _____
31 _____
32 _____
33 _____
34 _____
35 _____
36 _____
37 _____
38 _____
39 _____
40 _____

Signed this _____ day of _____, 20_____.

JANE B. DOE, Declarant

Approved and accepted this _____ day of _____, 20_____.

JOHN A. DOE, Spouse

STATE OF TEXAS

COUNTY OF ANYCOUNTY

On this the _____ day of _____, 20____, before me, a Notary Public, personally appeared **JOHN A. DOE AND JANE B. DOE**, personally known to me to be the persons whose names are subscribed to this instrument, and acknowledged that they executed it for the purposes herein expressed.

Notary Public, State of Texas

PERSONAL PROPERTIES TRANSFERRED INTO THE TRUST
(i.e., household furnishings, cars, mobile homes)

No.	Item Description	Date Transferred
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		
23		
24		
25		

PERSONAL PROPERTIES TRANSFERRED INTO THE TRUST

(i.e., household furnishings, cars, mobile homes)

<u>No.</u>	<u>Item Description</u>	<u>Date</u> <u>Transferred</u>
26		
27		
28		
29		
30		
31		
32		
33		
34		
35		
36		
37		
38		
39		
40		
41		
42		
43		
44		
45		
46		
47		
48		
49		
50		

INVESTMENT SAVINGS TRANSFERRED INTO THE TRUST

(i.e., stocks, bonds, C.D.'s)

<u>No.</u>	<u>Account #</u>	<u>Location</u>	<u>Date</u> <u>Transferred</u>
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			
24			
25			

REAL ESTATE PROPERTIES TRANSFERRED INTO THE TRUST

No.	Location	Date	Transferred
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			
24			
25			

Sample **INSURANCE & QUALIFIED PLAN TRANSFER**

Sample

TO: Company Name, 123 Main Street, Biztown, Texas 79999

FROM: John and Jane Doe, 1234 Main Street, Anytown, Texas 70000

As part of my(our) estate plan, I(we) have established a Revocable Living Trust dated January 1, 19XX. I(we) now desire to change the beneficiary of my(our) life insurance policies, and the contingent beneficiary of annuities Account # 99999999 to the Trust. The beneficiary (or contingent beneficiary if your spouse is already named as the primary beneficiary) should now read:

John Doe and Jane Doe Trustees of
THE
JOHN DOE AND JANE DOE
REVOCABLE LIVING TRUST

You are hereby given the power to accept orders and other instructions relative to the Trust from the Trustee(s). They may execute any documents on behalf of the Trust which you may require. The Trustee(s) is(are) empowered to act on behalf of the Trust.

John Doe

TRUSTEE

Jane Doe

TRUSTEE

I(We) certify that I(we) have the power, under the Trust and applicable law, to enter into transactions for the benefit of the Trust.

I(We), the Trustee(s), jointly and severally indemnify you, and hold you harmless from any liability for effecting transactions of the type specified above, should you act pursuant to instructions given herein.

I(We) agree to inform you, in writing, of any amendments, change of Trustee(s) or other event which could alter the above certifications. Thank you for your assistance.

Signed this 1st day of January, 19XX

TRANSFEROR(S):

TRANSFEREE(S):

John Doe

John Doe

Jane Doe

Jane Doe

SUBSCRIBED AND SWORN to before me, the undersigned authority, this _____ day of _____ 19____.

Notary Public, State of _____

INSURANCE & QUALIFIED PLAN TRANSFER

TO: _____

FROM: John A. and Jane B. Doe, 1234 Main Street, Anytown, Texas 70000

As part of my(our) estate plan, I(we) have established a Revocable Living Trust dated _____ 19_____. I(we) now desire to change the beneficiary of my(our) life insurance policies, and the contingent beneficiary of annuities Account # _____ to the Trust. The beneficiary (or contingent beneficiary if your spouse is already named as the primary beneficiary) should now read:

John A. Doe or Jane B. Doe, Trustee(s) of

THE

JOHN A. DOE AND JANE B. DOE

REVOCABLE LIVING TRUST

You are hereby given the power to accept orders and other instructions relative to the Trust from the Trustee(s). They may execute any documents on behalf of the Trust which you may require. The Trustee(s) is(are) empowered to act on behalf of the Trust.

TRUSTEE

TRUSTEE

I(We) certify that I(we) have the power, under the Trust and applicable law, to enter into transactions for the benefit of the Trust.

I(We), the Trustee(s), jointly and severally indemnify you, and hold you harmless from any liability for effecting transactions of the type specified above, should you act pursuant to instructions given herein.

I(We) agree to inform you, in writing, of any amendments, change of Trustee(s) or other event which could alter the above certifications. Thank you for your assistance.

Signed this _____ day of _____, 19_____
TRANSFEROR(S): TRANSFEREE(S):

SUBSCRIBED AND SWORN to before me, the undersigned authority, this _____
day of _____ 19_____.

Notary Public, State of Texas.

GENERAL ASSETS TRANSFER

TO: _____
FROM: John A. and Jane B. Doe, 1234 Main Street, Anytown, Texas 70000;

As part of my(our) estate plan, I(we) have established a Revocable Living Trust dated _____, 19_____. I now desire to transfer my(our) _____ Account #. _____, now in Sole, Joint Tenancy, or Community Property ownership to the Trust. Please transfer the title of this asset to read as follows:

John A. Doe or Jane B. Doe, Trustee(s) of
THE
JOHN A. DOE AND JANE B. DOE
REVOCABLE LIVING TRUST

You are hereby given the power to accept orders and other instructions relative to the Trust from the Trustee(s). They may execute any documents on behalf of the Trust which you may require. The Trustee(s) is(are) empowered to act on behalf of the Trust. This investment is suitable for the Trust.

TRUSTEE

TRUSTEE

I(We) certify that I(we) have the power, under the Trust and applicable law, to enter into transactions for the benefit of the Trust.

I(We), the Trustee(s), jointly and severally indemnify you, and hold you harmless from any liability for effecting transactions of the type specified above, should you act pursuant to instructions given herein.

I(We) agree to inform you, in writing, of any amendments, change of Trustee(s) or other event which could alter the above certifications. Thank you for your assistance.

Signed this _____ day of _____, 19_____.
TRANSFEROR(S): _____ TRANSFEREE(S): _____

SUBSCRIBED AND SWORN to before me, the undersigned authority, this _____
day of _____ 19_____.

Notary Public, State of _____

**REQUEST FOR CHANGE OF BENEFICIARY
P.O.D. ACCOUNTS AND CERTIFICATES OF DEPOSIT**

TO: _____

FROM: John A. and Jane B. Doe, 1234 Main Street, Anytown, Texas 70000:

As part of my(our) estate plan, I(we) have established a Revocable Living Trust dated _____ 19____. I(we) now desire to change the beneficiary of my(our) checking account or Certificate of Deposit, Account # _____, to the Trust. The beneficiary (or contingent beneficiary) should now read:

John A. Doe or Jane B. Doe, Trustee(s) of
**THE
JOHN A. DOE AND JANE B. DOE
REVOCABLE LIVING TRUST**

You are hereby given the power to accept orders and other instructions relative to the Trust from the Trustee(s). They may execute any documents on behalf of the Trust which you may require. The Trustee(s) is(are) empowered to act on behalf of the Trust.

TRUSTEE

TRUSTEE

I(We) certify that I(we) have the power, under the Trust and applicable law, to enter into transactions for the benefit of the Trust.

I(We), the Trustee(s), jointly and severally indemnify you, and hold you harmless from any liability for effecting transactions of the type specified above, should you act pursuant to instructions given herein.

I(We) agree to inform you, in writing, of any amendments, change of Trustee(s) or other event which could alter the above certifications. Thank you for your assistance.

Signed this _____ day of _____, 19____.

TRANSFEROR(S):

TRANSFeree(S):

SUBSCRIBED AND SWORN to before me, the undersigned authority, this _____
day of _____ 19____.

Notary Public, State of _____.