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How to Complete a General Assignment to Your Living Trust

Moving Personal Belongings and Other Assets Into Your Revocable Trust

INSTRUCTIONS — KEEP FOR YOUR RECORDS. DO NOT ATTACH THIS PAGE TO YOUR GENERAL ASSIGNMENT.

About this form. A living trust only controls property that has been **transferred into it**. Real estate moves by deed; many other assets — belongings, collectibles, business interests, and some accounts — can be moved with a signed **general assignment**. It is a simple, commonly used way to help "fund" a trust and avoid probate for items you may forget to retitle.

1. **Have your signed trust in front of you**
   Copy the trust's exact name and date and the trustee names. The trust must already be signed.
2. **Mark what you are assigning**
   Mark each category, and list any specific valuable assets (for example, artwork or a business interest) by description.
3. **Review the exclusions**
   Retirement accounts, life insurance, and accounts with beneficiaries pass by beneficiary designation — **do not** assign them. Add any other items you want to keep out.
4. **Retitle major accounts too**
   Banks and brokerages may still require their own forms to retitle accounts into the trust. This assignment is a backup, not a substitute.
5. **Sign in front of a notary**
   Each settlor signs. Do **not** sign ahead of time. Bring a current government-issued photo ID. We come to your home or office, and can notarize your Trust Transfer Deed at the same visit.
6. **Keep it with your trust**
   Store the signed original with your trust documents and tell your successor trustee where it is.

Good to Know

- Real estate needs its own deed. Use a Trust Transfer Deed for your California home.
- Vehicles can usually be handled through the DMV or by naming a transfer-on-death beneficiary on the title.
- Do not have a trust yet? Gavrilov & Brooks can prepare one for you.

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SCAN TO BOOK

Questions about this document? Talk to an attorney. Gavrilov & Brooks Law Firm has attorneys licensed in California, Nevada, and other states. Phone and video consultations are available. **(916) 504-0529** · **www.gavrilovlaw.com**

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YOUR FORM BEGINS ON THE NEXT PAGE

GENERAL ASSIGNMENT OF ASSETS TO LIVING TRUST

Assignment of Personal Property to a Revocable Trust

1. Assignment. For good and valuable consideration, I/we, the undersigned,

_____

(name(s) of assignor(s) — the settlor(s) of the trust)

hereby assign, transfer, and convey to

_____

(name(s) of trustee(s))

as Trustee(s) of the

_____ _____

(exact name of trust) (date of trust)

and any amendments to it, all of my/our right, title, and interest in the following property, now owned or later acquired (mark all that apply):

- ☐ All tangible personal property, including furniture, furnishings, household goods, jewelry, art, collectibles, tools, and clothing, wherever located.
- ☐ All bank, savings, and investment accounts held in my/our name(s) alone, except those excluded below.
- ☐ All interests in businesses, partnerships, LLCs, and corporations, to the extent transferable.
- ☐ All promissory notes, receivables, and claims owed to me/us.
- ☐ Copyrights, patents, trademarks, royalties, and other intellectual property.
- ☐ The following specific assets:

2. Excluded property. This assignment does **not** include: (a) individual retirement accounts, 401(k)s, pensions, and other tax-qualified retirement plans; (b) life insurance and annuities; (c) any account or asset with a named beneficiary or payable-on-death designation; (d) real property, which is transferred by separate deed; and (e) the following:

_____

(other exclusions, e.g., a vehicle or a specific account; write “none” if none)

3. Intent. It is my/our intent that all property described above be held and administered as part of the trust, and that this assignment be given effect even if title to a particular item is not separately changed. I/We will sign any further documents needed to complete the transfer. This assignment may be revoked or changed only as the trust permits.

Dated: _____

_____ _____

(signature of assignor / settlor) (signature of second settlor, if any)

_____ _____

(printed name) (printed name)

Sign in front of the notary public, who will complete the acknowledgment on the next page.

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CERTIFICATE OF ACKNOWLEDGMENT

Notary acknowledgment of the settlor signature(s) on this General Assignment.

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California)

County of _____)

On _____ before me, _____

(here insert name and title of the officer)

personally appeared _____

, who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

(Seal)

Signature _____