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How to Fund Your Trust with a General Assignment

General Assignment of Assets to Trust — New York

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

About this form. A trust only controls the property that is actually **transferred into it**. New York law treats a lifetime trust as valid only for assets whose ownership has been transferred to the trustee. This assignment moves your **personal property** and listed assets into your trust in one document.

1. **Name yourself and the trustee**
   Enter your name and address, and the trustee(s), trust name and trust date exactly as in the trust agreement.

2. **Choose what to transfer**
   Initial the tangible personal property line and/or list specific assets in Schedule A. Be precise about accounts and business interests.

3. **Remember what needs its own paperwork**
   Real estate needs a recorded deed, vehicles need DMV retitling, and accounts may need the institution's own forms. Retirement accounts and life insurance pass by beneficiary designation.

4. **Sign before a notary**
   Sign with a current government-issued photo ID, and have the trustee sign the acceptance. Notarization gives banks and brokers confidence that the transfer is genuine.

After It's Signed

- Keep the signed original with your trust agreement and give copies to the trustee.
- Send a copy, with a Certification of Trust, to each bank or broker holding listed assets and ask them to retitle the accounts.
- Update this assignment, or sign a new one, when you acquire significant new assets.

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Have questions about this form? To consult with an attorney, contact **Gavrilov & Brooks Law Firm** at **(916) 504-0529** or **www.gavrilovlaw.com**, 2315 Capitol Avenue, Sacramento, CA 95816. **Attorneys licensed in New York.** Main headquarters in Sacramento, California.

This form is provided as a free convenience. First Choice Mobile Notary & Apostille is not a law firm, and a notary public cannot give legal advice or help you decide what to write on this form. These instructions are general information only and are not legal advice. If you have questions about your situation, consult a licensed New York attorney.

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GENERAL ASSIGNMENT OF ASSETS TO TRUST

New York — Transfer of Personal Property to Trustee (EPTL § 7-1.18)

I, _____, residing at _____, (the "Assignor"), for good and valuable consideration, the receipt of which is acknowledged, assign, transfer and convey to:

_____, as Trustee(s) of the _____ dated _____, and to any successor trustee(s) (the "Trustee"), all of my right, title and interest in the following property (the "Assets"):

(_____) All of my tangible personal property now owned or later acquired, including furniture, furnishings, jewelry, art, collectibles, books, tools and household goods, wherever located.

(_____) The specific property listed in Schedule A below.

Schedule A — Specific Assets

Describe each asset (for example: bank or brokerage account at ___ ending in ____; shares of ___ Inc.; promissory note dated ___ from ___; membership interest in ___ LLC; intellectual property; business equipment).

Property Not Covered

This assignment does not transfer real property, which must be transferred by a recorded deed; motor vehicles, boats or other property with a certificate of title, which must be retitled with the issuing agency; retirement accounts, annuities or life insurance, which pass by beneficiary designation; or any property whose transfer would violate a contract or law, unless the necessary consents are obtained.

Further Assurances

I agree to sign any further documents reasonably needed to complete the transfer of the Assets to the Trustee, and I authorize the Trustee to present this assignment to any person holding the Assets. The Trustee accepts the Assets to hold under the terms of the trust.

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Signature of Assignor

Date

Printed name

Acceptance by Trustee

Signature of Trustee

Date

Printed name

ACKNOWLEDGMENT OF ASSIGNOR IN NEW YORK (Real Property Law § 309-a)

State of New York)
) ss.:
County of _____)

On the _____ day of _____ in the year _____ before me, the undersigned, personally appeared _____ personally known to me or proved to me on the basis of satisfactory evidence to be the individual(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 capacity(ies), and that by his/her/their signature(s) on the instrument, the individual(s), or the person upon behalf of which the individual(s) acted, executed the instrument.

Signature and office of individual taking acknowledgment

Notary Public, State of New York; Qualified in _____ County

Registration No. _____; Commission Expires _____

(Notary stamp)

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ACKNOWLEDGMENT OUTSIDE NEW YORK (Real Property Law § 309-b)

Use this certificate instead of the New York certificate if the document is signed outside New York State.

State (or District / Country) of _____)
) ss.:
County of _____)

On the _____ day of _____ in the year _____ before me, the undersigned, personally appeared _____ personally known to me or proved to me on the basis of satisfactory evidence to be the individual(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 capacity(ies), that by his/her/their signature(s) on the instrument, the individual(s), or the person upon behalf of which the individual(s) acted, executed the instrument, and that such individual made such appearance before the undersigned in _____.

insert the city or other political subdivision and the state or country or other place the acknowledgment was taken

_____
Signature and office of individual taking acknowledgment

(Notary seal or stamp)

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