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How to Complete a Pennsylvania Assignment of Assets to Trust

General Assignment of Assets to a Revocable Living Trust

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

About this form. A living trust only avoids probate for property that is actually put into it. This assignment moves household belongings and other untitled personal property into your trust, and can list specific items. Real estate needs a separate deed.

1. **Name the trust and trustee(s)**
   Use the exact trust name and date.
2. **Choose what to assign**
   All household personal property, specific listed items, or both.
3. **Sign before a notary**
   Each assignor signs. Bring a current photo ID.
4. **Fund the rest separately**
   Use a Deed to Living Trust for real estate and contact each bank for accounts.

Signing requirements: Signed by the assignor(s) before a notary; the trustee(s) sign the acceptance.

After It's Signed

- Keep the original with your trust documents.

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Have questions about your Assignment of Assets? To consult with an attorney, contact **Gavrilov & Brooks Law Firm** at **(916) 504-0529** or **www.gavrilovlaw.com**.

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GENERAL ASSIGNMENT OF ASSETS TO LIVING TRUST

Commonwealth of Pennsylvania

Assignor(s) (settlor)

Trustee(s)

Name and date of trust

For good and valuable consideration, and to fund the trust named above, the assignor(s) hereby assign, transfer and convey to the trustee(s), to be held under the terms of the trust:

- ☐ All of the assignor's tangible personal property, including household furniture and furnishings, jewelry, artwork, collectibles, tools and equipment, wherever located, now owned or later acquired, except motor vehicles and property that requires a separate title or registration.
- ☐ The specific property listed below (and on any attached schedule):

- ☐ Any property that the assignor owns at death that is not otherwise effectively transferred, to the extent permitted by law.

This assignment does not transfer real estate (which requires a deed), titled vehicles, retirement accounts, or accounts with a beneficiary or payable-on-death designation. The assignor(s) agree to sign any further documents needed to complete the transfer. A copy of this assignment has the same effect as the original.

X

Assignor signature

X

Assignor signature

Printed name and date

Printed name and date

Acceptance by trustee(s). The trustee(s) accept this assignment and will hold the property under the terms of the trust.

X

Trustee signature

Date

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ACKNOWLEDGMENT

COMMONWEALTH OF PENNSYLVANIA

COUNTY OF _____

This record was acknowledged before me on _____ (date) by _____ (name(s) of individual(s)).

X _____
Signature of notarial officer

_____
Title of office (e.g., Notary Public)

_____ _____
My commission expires Commission number

(Notary seal)

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