

# **PROPERTY TRANSFER PROCEDURE AFTER DEATH OF TRUSTMAKER**

## **I. *Valuation Process***

- a. Contact Financial Institutions (By Phone and on Their Website!)**
  - 1. *Notify* that Death Has Occurred**
  - 2. Value of Account on Date of Death**
  - 3. What Paperwork is needed**

## **II. *Transfer Process***

- a. Letter of Instruction (if applicable)**
- b. Death Certificate**
- c. Affidavit of Trust**
  - 1. New Tax Identification Number**
  - 2. Successor Trustees**
- d. Consent to Transfer Form**