

## **TRUST FUNDING INSTRUCTIONS**

(Transferring Your Assets To Your Trust)

When transferring assets to the Trust or when designating the Trust as a beneficiary, the following name should be used:

Shui-Chin Chen and Daphne Chen, Trustees of the Shui-Chin and Daphne Chen  
2005 Trust.

### **ASSET**

### **PERSON TO CONTACT/ NECESSARY INFORMATION**

Bank Accounts (checking and savings accounts, money market and CD accounts)

Contact your bank or savings institution (transfer only if balances average \$7,500 or more).

Stocks and Bonds (Publicly executive traded) at your stock brokerage firm.

Contact your account executive at your stock brokerage firm.

Stock of a Closely-Held Corporation

Contact the secretary of the Corporation or provide this office with your original stock certificate and the corporate stock book.

Real Estate

Provide this office with a copy of the Grant Deed by which you acquired the property.

Personal and Household Articles

List these assets on the Exhibit to your Trust if they have a substantial value, i.e., \$5,000 or more.

Pension and Profit Sharing Plans, IRA's

Contact the Trustee of the Plan or Custodian and request a beneficiary designation form. Indicate that the new alternate beneficiaries are: (1) participant's spouse, (2) Trustee(s) of your Trust.

Life Insurance

Contact your Life Insurance agent and request a beneficiary designation form. Indicate on the form that the new beneficiary is the Trustee(s) of your Trust.

**ASSET**

**PERSON TO CONTACT/  
NECESSARY INFORMATION**

Patents and Copyrights

Provide this office with patent numbers or copyright material.

Boats and Airplanes

Contact the Federal Aviation Administration or Coast Guard.

Promissory Notes

Provide this office with a copy of the promissory note and, if secured by a deed of trust, provide us with a copy of the deed of trust

Partnerships  
(General & Limited)

A. If the Partnership is not represented by this office, contact the general partner.

B. If the general partner is unable to make the transfer, provide this office with a copy of the Partnership Agreement and the Statement of Partnership (if a General Partnership) or the Certificate of Limited Partnership (if a Limited Partnership).

C. If the Partnership is represented by this office, provide this office with the name of the Partnership.

When contacting any of the parties or institutions mentioned above, it is advisable to take with you the Certification of Trust which describes the various powers of the Trustees of the Trust.

Each time a new asset (with a value of \$5,000 or more) is acquired you should take title to the asset in the name of the Trust.

Each time a new asset is acquired or a procedural question arises with regard to an asset held in trust, you should refer to these instructions for guidance. However, they are only guidelines to the funding of your Trust. Whenever any question cannot be completely answered by this summary or non-routine types of property are encountered, please feel free to contact this office.