

(example)

**Sammy & Sue Seller  
123 Main  
Anywhere, State  
Zip  
Phone #**

**(Date)**

**(Name & Address of Insurance Agent & Company)**

Regarding Policy #: \_\_\_\_\_

Property Address: \_\_\_\_\_

To Whom It May Concern:

Please be advised that we \_\_\_\_\_ **(owners)**  
intend to transfer title to the above listed property into a revocable, intervivos trust. The  
Trustee's name is \_\_\_\_\_, whose address is  
\_\_\_\_\_.

Please amend your policy to reflect the "loss payee" as the following:

\_\_\_\_\_ **(name of trustee)**, as Trustee for the \_\_\_\_\_  
\_\_\_\_\_ Trust and the Beneficiaries as their interests may appear.

Also, please be advised that the following parties will need to be of record as  
"additional insureds" for liability purposes:

Beneficiary \_\_\_\_\_

Beneficiary \_\_\_\_\_

Trustee \_\_\_\_\_

Sincerely,

**Sammy & Sue Seller**