

(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, inter vivos 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**