



Release and Transfer Agreement FAQ's

1. What is the purpose of this Agreement?

This agreement can be used to transfer your current account to another individual or entity. For example, if your account is currently held by you as an individual (your name is on the checks) but you now want your assets held in your Trust (and future checks to be sent to your Trust), you can use the agreement to transfer your individual account to your Trust. Additionally, you may use this form to transfer your account to your spouse or children (while you are still living).

2. Who is the Transferor?

The Transferor is the current account holder (ABC "investor").

3. Who is the Transferee?

The Transferee is the person or entity to whom the account is to be transferred. In other words, the new account holder.

4. Where should I send the completed form?

The completed, signed and notarized form and W-9 (for the new account holder), should be mailed to the Conservator's office:

**Tom Moran, Conservator
PO Box 14541
Oklahoma City, OK 73113**

5. If I have a question about the agreement, who should I call?

For general account questions, you can call or email the Conservator's office. The contact information is provided at the top of this page.

Please keep in mind that this is a legal agreement and the Conservator and his staff are *not* qualified to give legal advice. All tax or legal questions should be directed to your own attorney or tax professional.

6. Is there anything else that I need to send along with the agreement?

The new account holder must send in a completed and signed **IRS form W-9**. We must have this form to set up the new account. You can find a W-9 on the Conservator's website or on the web by searching "IRS form W-9".