**Request for Transfer of Interest in the Event of the Death**

**of an Individual or a Grantor of Trust**

*In the event of the death of an individual, the following documentation will be required:*

1. Certified copy of the death certificate;

2. Copy of the Will;

3. Letters of Office or Administration (typically issued by the state) identifying the executor of the estate; and

4. Request Form for Transfer of Interest in the Event of the Death of an Individual or a Grantor of Trust **OR** a separate Letter of Direction.

*In the event of the death of the grantor of a trust:*

1. Certified copy of the death certificate;

2. Copy of the trust document, identifying the trustees and successor trustees; and

3. Request Form for Transfer of Interest in the Event of the Death of an Individual or a Grantor of Trust **OR** a separate Letter of Direction.

*Please note:*

1. When we are in receipt of the above documentation, we will draw up a form of Assignment to be executed by all parties;

2. If the interest is being transferred to a trust, we will require a copy of the trust document in order to establish this type of new account;

3. We require original signatures and are unable to accept documents and correspondence in connection with transfers via facsimile or email; and

4. All information should be directed to us at:

Cheryl Pala

Director of Investor Services

M & J Wilkow, Ltd.

20 South Clark Street

Suite 3000

Chicago, Illinois 60603

[cpala@wilkow.com](mailto:cpala@wilkow.com)

(312) 279.5967

**Request for Transfer of Interest in the Event of the Death**

**of an Individual or a Grantor of Trust**

**Current Investor or Account “(Transferor)” Name:**

**Transferor’s Tax ID Number:**

**Phone number and email address for the Executor or Trustee:**

**Address of the Executor or Trustee:**

**Names of Wilkow-related partnerships to be transferred:**

**1.**

**2.**

**3.**

*If there are further holdings, please attach on a separate sheet.*

**Information about the New Investor or Account “(Transferee)”, including Name(s), Tax ID Numbers (TIN), addresses, and number of units of partnerships to be transferred:**

**Transferee’s Name: TIN:**

**Phone number and email address for the Executor or Trustee:**

**Address of Transferee:**

**Partnership Name: Number of Units:**

**Partnership Name: Number of Units:**

**Partnership Name: Number of Units:**

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**Transferee’s Name: TIN:**

**Phone number and email address for the Executor or Trustee:**

**Address of Transferee:**

**Partnership Name: Number of Units:**

**Partnership Name: Number of Units:**

**Partnership Name: Number of Units:**

**Transferee’s Name: TIN:**

**Phone number and email address for the Executor or Trustee:**

**Address of Transferee:**

**Partnership Name: Number of Units:**

**Partnership Name: Number of Units:**

**Partnership Name: Number of Units:**

*If there are additional transferees, please attach their information on a separate sheet.*

***Should you have any questions concerning these requirements, please contact us at (312)279-5967 or via email at cpala@wilkow.com.***

***We reserve the right to require additional information on a case-by-case basis, if necessary, to establish ownership identity or authority.***

**Executor/Trustee Certification:**

**I hereby certify that the information and direction included herein are complete to the best of my knowledge.**

**Signature**

**Print name**

**Title**

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