

# STANDARD LEGAL™

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## **AFFIDAVIT OF SUCCESSOR TRUSTEE**

This form can be used to identify or verify the name of the Successor Trustee of a Trust – the person that succeeds the initial or original Trustee named in the Trust.

The information regarding the Grantor of the Trust (the person that created the Trust), the name of the Trust, the date of the Trust was created and the date of the death of the Grantor must be inserted in the document. The name of the Successor Trustee must also be provided.

The Affidavit should then be printed to paper and the Successor Trustee should sign his or her name – and his/her signature must be notarized.

Depending on how this Affidavit will be used, the Grantor's death certificate should be attached to this Affidavit, as well as the portions of the Trust naming the Successor Trustee to that position. Note that in many jurisdiction, certain information in the death certificate (e.g. social security number, date of birth, etc.) may need to be redacted before this affidavit is filed or recorded. Check your local law for redaction requirements.

*Discard this instruction page – it is NOT part of the Affidavit.*

[END OF INSTRUCTIONS]

**AFFIDAVIT OF SUCCESSOR TRUSTEE**

State of \_\_\_\_\_ )  
County of \_\_\_\_\_ )

I, \_\_\_\_\_, being first sworn, depose and state from personal knowledge that:

1. \_\_\_\_\_ [the "Grantor"], established the \_\_\_\_\_ [the "Trust"], the Trust being dated \_\_\_\_\_.

2. The Grantor died on \_\_\_\_\_. A redacted copy of the Grantor's death certificate (or other appropriate evidence of death) is attached hereto;

3. \_\_\_\_\_ is the Successor Trustee under the terms of the Trust agreement,

4. \_\_\_\_\_, as Successor Trustee, has accepted the Trusteeship and has agreed to serve as Trustee under the terms of the Trust. The relevant portions of the Trust document, evidencing the appointment of the Successor Trustee, are attached hereto.

Affiant Further sayeth naught.

\_\_\_\_\_

**ACKNOWLEDGMENT**

BEFORE ME, a Notary Public in and for said county and state, personally appeared \_\_\_\_\_, named above as Successor Trustee, who acknowledged that he/she did sign the foregoing instrument, and that the same is his/her free act and deed. IN TESTIMONY WHEREOF, I have hereunto set my hand and official seal at \_\_\_\_\_, on \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Notary Public  
My commission expires: