

**APPENDIX B**  
**Revocable Trust with Grantor**

**Acting as Sole Trustee**  
**(Alternate Version)**

\_\_\_\_\_ **REVOCABLE TRUST**

**THIS TRUST AGREEMENT**, made this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_, by and between \_\_\_\_\_, residing at [Street Address], [City/Town], [State] [ZIP Code] (“Settlor”) and the same, \_\_\_\_\_, residing at [Street Address], [City/Town], [State] [ZIP Code] (“Trustee”).

**WITNESSETH:**

**WHEREAS**, Settlor desires to establish and create a revocable trust for the purposes and intentions hereinafter set forth; and

**WHEREAS**, Settlor, in order to effect such intentions, has delivered, transferred and set over to the Trustee all of the rights, powers, options, titles, claims and benefits of Settlor in and to certain assets and properties listed in Schedule A, annexed hereto and made a part hereof, receipt of which is hereby acknowledged (the “Trust Fund”); and

**WHEREAS**, Settlor or any third party, including but not by way of limitation, Settlor’s descendants, may at any time and from time to time desire to deposit, assign, deliver, transfer and set over to the Trustee other personal or real property, both tangible and intangible; and

**WHEREAS**, the Trustee agrees to hold and administer such property herewith deposited, delivered, assigned, transferred and set over to the Trustee or which may hereafter become part of the Trust Fund in accordance with the following terms and provisions, for the uses and purposes hereinafter set forth.

**NOW, THEREFORE**, it is agreed as follows:

**ARTICLE 1**

**TITLE OF TRUST**

**1.1 Name.** The name of the Trust shall be the “\_\_\_\_\_ **REVOCABLE TRUST.**”

**ARTICLE 2**

**TRUST PROPERTY**

**2.1 Initial Trust Property.** Settlor hereby assigns, transfers and sets over to the Trustee all of Settlor’s rights, powers, options, titles, claims and benefits in and to all the assets listed in Schedule A, annexed hereto and made a part hereof. The Trustee acknowledges receipt of the property described in Schedule A and agrees to hold and administer the Trust Fund in accordance with the purposes and on the conditions hereinafter set forth.

**2.2 Additional Property.** Settlor or any other person, with the consent of the Trustee, may add other property to this Trust by transferring such property to the Trustee by deed, assignment, bequest, devise, or by other instruments of transfer. All such additional property shall be covered by the provisions of this Trust Agreement as if an original asset of the Trust Fund.