



***Important Notes:**

1. You will need to draft a Deed and submit it to us along with the Transfer Authorization. You may contact an attorney or real estate professional to assist you with drafting the deed to ensure that it is properly prepared. The deed must be titled "Madison Trust Company, Custodian F/B/O [Accountholder's name & MTC Account #]" and should state "Record and return to: Madison Trust Company 21 Robert Pitt Drive Suite 201, Monsey, NY 10952".
2. You will also need to send us a recent valuation of the property so we can accurately record the value of the property on our books. Acceptable valuations include: a letter from a realtor (on their letterhead) con firming the fair market value, or a recent tax assessment notice.
3. If there is a mortgage on the property, you will need to contact the lender and have them change the title of the loan to "Madison Trust Company, Custodian F/B/O [Accountholder's name & MTC Account #]"