

No. \_\_\_\_\_

**COURT INSTRUCTIONS TO THE 867 MANAGEMENT TRUSTEE**

As the duly appointed Trustee of this Management Trust, you are hereby advised by the Court that you must do the following:

***Please be advised that the date the trust is created/approved by the Court will be the anniversary date of your appointment.***

1. File an asset specific/value receipt for funds or other property within 5 (five) days from the date you receive said property/funds;
2. File your Annual Account each year on the anniversary date of your appointment. This account should be prepared by your attorney; *(required format available from Court)*
3. Obtain a written order of this Court authorizing trustee's compensation as required by §868 (5) of the Texas Probate Code;
4. Notify the Court in writing of any change of information contained in the Trustee information sheet;
5. File your Final Accounting when the 867 Trust is ready to be closed due to the death of the ward/minor or expiration of the term of the trust. This should be prepared by your attorney;
6. Consult with your attorney on any matter regarding this 867 Management Trust that you do not understand.

\_\_\_\_\_  
Joel Baker, Judge  
County Court, Smith County, Texas

I, \_\_\_\_\_, the Trustee of this 867 Management Trust, and on behalf of \_\_\_\_\_ *(Institution)* hereby attest that I have read the above and understand its contents.

\_\_\_\_\_  
Trustee

\_\_\_\_\_  
Date