

Application for Access to Beneficiary Trust Documents

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Date]

[Trustee's Name]

[Trustee's Address]

[City, State, Zip Code]

Dear [Trustee's Name],

I am writing to formally request access to the beneficiary trust documents related to the [Name of Trust] for the purpose of tax assessment. As a beneficiary of the trust, it is essential for me to review these documents to ensure compliance with tax regulations and to properly report my tax obligations.

Specifically, I would like to access the following documents:

- Trust Agreement
- Tax Returns for the past [number] years
- Account statements
- Any other relevant financial documents

According to [mention any applicable law or regulation], I understand that as a beneficiary, I have the right to review these documents. I would appreciate your prompt attention to this matter and kindly request that the documents be made available to me by [specific date].

Please let me know if you require any further information from my side to facilitate this request.

Thank you for your assistance.

Sincerely,

[Your Name]