

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Date]

[Trustee's Name]

[Trustee's Title]

[Name of Trust]

[Trust's Address]

[City, State, Zip Code]

Dear [Trustee's Name],

I hope this message finds you well. I am writing to formally request information regarding the beneficiary trust associated with [Trust Name], of which I am a beneficiary.

As part of a financial review, I would appreciate it if you could provide the following information:

- Current balance of the trust
- Statement of distributions made in the last year
- Details of any upcoming distributions
- Any relevant tax documentation

If possible, I would appreciate receiving this information by [specific date], as it is important for my financial planning.

Thank you for your attention to this matter. Please feel free to contact me at [your phone number] or [your email address] should you require any further information.

Sincerely,

[Your Name]