

Petition for Beneficiary Trust Documentation

Date: _____

To: [Trustee's Name]

[Trustee's Address]

[City, State, Zip Code]

Dear [Trustee's Name],

I hope this letter finds you well. I am writing to formally request documentation related to the beneficiaries of the [Name of the Trust] Trust, which is managed by your office. As a beneficiary of this trust, I would like to ensure that my personal records are complete and accurate.

Specifically, I kindly request the following documentation:

- Copy of the trust agreement
- List of current beneficiaries
- Recent account statements
- Any amendments to the trust

Please let me know if there are any forms or additional information that you require from me to process this request. I appreciate your attention to this matter and look forward to your prompt response.

Thank you for your assistance.

Sincerely,

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email Address]

[Your Phone Number]