

Request for Beneficiary Trust Documentation

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email Address]

[Your Phone Number]

[Trustee's Name]

[Trustee's Address]

[City, State, Zip Code]

Dear [Trustee's Name],

I hope this message finds you well. I am writing to formally request copies of the beneficiary trust documentation pertaining to the [Name of the Trust] as part of my estate planning process.

As a beneficiary of this trust, it is important for me to review the relevant documents to ensure proper understanding and alignment of my estate planning goals. I would appreciate it if you could provide the following documents:

- Trust Agreement
- Coprincipal Beneficiary Agreements
- Account Statements

If possible, I would like to receive these documents by [Insert Desired Date]. Should you have any questions or require further information, please do not hesitate to contact me at the number or email provided above.

Thank you for your assistance with this matter. I look forward to your prompt response.

Sincerely,

[Your Name]