

Date: [Insert Date]

[Your Name]

[Your Title]

[Your Organization]

[Your Address]

[City, State, Zip Code]

Email: [Your Email]

Phone: [Your Phone Number]

[Recipient's Name]

[Recipient's Title]

[Recipient's Organization]

[Recipient's Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I hope this letter finds you well. We are currently in the process of conducting an audit of the beneficiary trust associated with [Trust Name or Account Number]. As part of this process, we kindly request your assistance in providing the relevant beneficiary trust statements.

The statements are necessary for us to ensure compliance and transparency in our auditing procedures. We would greatly appreciate it if you could send us the statements for the period of [Insert Time Frame], either electronically or via traditional mail, by [Insert Deadline].

Thank you for your attention to this matter. Should you have any questions or require further clarification, please do not hesitate to reach out to me directly at [Your Phone Number] or [Your Email].

We look forward to your prompt response.

Sincerely,

[Your Name]

[Your Title]

[Your Organization]