

Beneficiary Financial Statement Inquiry

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient Name]

[Recipient Title]

[Organization Name]

[Organization Address]

[City, State, Zip Code]

Dear [Recipient Name],

I am writing to inquire about the financial statements related to the trust/beneficiary account associated with [Insert Beneficiary Name]. As a beneficiary, I would like to request a detailed account of the transactions and financial status of the trust as of [Insert Specific Date].

Understanding the financial condition is essential for me to make informed decisions regarding my share. I would appreciate it if you could provide the financial statements, including balance sheets, income statements, and any relevant notes pertaining to my inquiry.

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

Sincerely,

[Your Name]