

Beneficiary Statement

Date: [Insert Date]

[Trust Name]

[Trust Address]

[City, State, ZIP Code]

To: [Beneficiary Name]

[Beneficiary Address]

[City, State, ZIP Code]

Subject: Beneficiary Statement for Tax Documentation

Dear [Beneficiary Name],

This letter serves as an official statement regarding your status as a beneficiary of the [Trust Name] for the tax year ending [Tax Year]. In accordance with tax regulations, we are providing you with the necessary information for your tax documentation.

Trust Information

- Trust Name: [Trust Name]
- Tax ID: [Trust Tax ID]

Distribution Summary

Total Distribution Amount: \$[Total Amount Distributed]

Beneficiary Details

- Name: [Beneficiary Name]
- Address: [Beneficiary Address]
- Distribution Amount: \$[Beneficiary Distribution Amount]
- Tax Identification Number: [Beneficiary Tax ID]

Please retain this statement for your records and consult with your tax advisor for any additional questions or guidance regarding your tax obligations.

Thank you for your attention to this matter.

Sincerely,

[Your Name]

[Your Title]

[Trustee/Trust Administrator]

[Contact Information]