

Estate Planning Feedback

Date: [Insert Date]

To: [Trust Manager's Name]

From: [Your Name]

Subject: Feedback on Trust Management

Dear [Trust Manager's Name],

I hope this message finds you well. I am writing to provide feedback regarding the management of my trust, established under case number [Insert Case Number].

Positive Aspects

- Timely communication regarding account status and performance.
- Thorough understanding of estate planning strategies.
- Professional responsiveness to my inquiries and concerns.

Areas for Improvement

- Increased updates on investment performance and adjustments.
- Clarification regarding fees and charges associated with the trust management.
- More comprehensive meetings to review the trust's objectives and goals.

Thank you for your continued support and attention to my estate planning needs. I look forward to your response and working together to enhance the management of my trust.

Sincerely,

[Your Name]

[Your Contact Information]