

# Trust Account Setup Notification

**Date:** [Insert Date]

**To:** [Trustee's Name]

**Address:** [Trustee's Address]

Dear [Trustee's Name],

We are writing to inform you of the steps needed to set up an inheritance account for the [Trust Name] established under the last will and testament of [Testator's Name]. Below are the required steps and documentation necessary for the successful establishment of the account:

## Required Documentation:

- Trust Agreement
- Death Certificate of the Testator
- Identification Verification of the Trustee
- Tax Identification Number for the Trust

## Account Setup Process:

1. Gather the above-mentioned documentation.
2. Contact our office at [Office Phone Number] to schedule a meeting.
3. Submit all documents for verification.
4. Finalize the account setup and discuss investment options.

If you have any questions or need assistance, please do not hesitate to reach out to us.

Thank you for your attention to this matter.

Sincerely,

[Your Name]

[Your Position]

[Your Company Name]

[Your Contact Information]