

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Re: Advisory Services Regarding Fiduciary Duties and Corporate Trusteeship

Dear [Client Name],

This letter follows our recent discussion regarding the administration of [Name of Trust/Estate]. As your appointed advisor, we are writing to outline the scope of our fiduciary services and the responsibilities inherent in corporate trusteeship.

### **1. Scope of Fiduciary Services**

Our firm will provide oversight and advisory support to ensure that all actions taken are in the best interest of the beneficiaries. This includes investment management, tax planning coordination, and discretionary distribution reviews.

### **2. Standard of Care**

Under corporate trustee standards, we are bound by a legal duty of loyalty and prudence. We commit to managing assets with the care, skill, and caution that a prudent person acting in a like capacity would use to achieve the objectives of the trust.

### **3. Reporting and Transparency**

To maintain full transparency, we will provide the following:

- Quarterly account statements and performance reviews.
- Annual fiduciary accountings for all receipts and disbursements.
- Regular briefings on regulatory changes affecting the trust.

### **4. Conflict of Interest Policy**

As fiduciaries, we strictly avoid any activities that create a conflict between our interests and those of the trust. Any potential conflicts will be disclosed immediately to the beneficiaries and relevant legal counsel.

### **5. Next Steps**

We recommend a formal review meeting on [Date] to finalize the investment policy statement and distribution schedule. Please sign and return the enclosed acknowledgment to confirm your receipt of this advisory letter.

We look forward to serving as your professional partner in preserving this legacy.

Sincerely,

[Your Name/Signature]  
[Your Title]  
[Company Name]

---

**Acknowledgment**

I, [Client Name], acknowledge receipt of this Fiduciary Advisory Letter and understand the terms of the corporate trusteeship described above.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_