

[Date]

[Beneficiary Name]

[Address Line 1]

[Address Line 2]

[City, State, Zip Code]

RE: Advisory Notice Regarding Dividend Reinvestment Plan (DRIP) Participation

Dear [Beneficiary Name],

This letter serves as formal notification regarding the investment management strategy for the [Name of Trust] (the "Trust"). As the appointed Fiduciary, I am writing to advise you of the implementation of a Dividend Reinvestment Plan (DRIP) for the Trust's eligible equity holdings.

Plan Overview

Under this plan, all cash dividends declared by participating companies held within the Trust portfolio will be automatically reinvested into additional shares or fractional shares of the underlying security. These purchases will be made at the prevailing market price on the dividend payment date.

Fiduciary Rationale

The decision to utilize a DRIP is based on the following fiduciary considerations:

- **Compounding Growth:** Reinvesting dividends facilitates the long-term compounding of Trust principal.
- **Cost Efficiency:** Automatic reinvestment often reduces or eliminates brokerage commissions and transaction fees.
- **Dollar-Cost Averaging:** Regular reinvestment allows the Trust to acquire shares consistently across varying market cycles.

Tax Implications

Please be advised that while dividends are being reinvested and not distributed as cash, they remain taxable as income in the year they are received by the Trust. The Trust will continue to provide the necessary tax documentation (Schedule K-1 or Form 1099) for your records.

Action Required

No action is required on your part at this time. This letter is for informational purposes to ensure transparency in the administration of the Trust assets. If you have any questions regarding how this affects your specific interest in the Trust, please contact my office at [Phone Number] or [Email Address].

Sincerely,

[Signature]

[Fiduciary Name]

[Title/Capacity, e.g., Trustee]