

[Date]

[Beneficiary Name]

[Address Line 1]

[Address Line 2]

Re: Notice of Fiduciary Succession and Estate Integration

Dear [Beneficiary Name],

This letter serves as formal notification regarding a change in the administration of the [Name of Trust/Estate]. Effective [Date], [Name of Outgoing Fiduciary] has resigned as [Trustee/Executor]. In accordance with the governing instruments, [Name of Incoming Fiduciary/Firm] has officially assumed all fiduciary responsibilities.

We are currently in the process of "Estate Integration," which involves the comprehensive transfer of books, records, and asset management oversight to our platform. Our primary goal during this transition is to ensure the continuity of distributions and the preservation of trust assets.

What this means for you:

- **Point of Contact:** Your new primary contact is [Relationship Manager Name] at [Phone Number/Email].
- **Distributions:** Scheduled distributions will continue as planned; however, please verify your banking information with us by [Date].
- **Reporting:** You will receive your first consolidated statement under our management beginning [Month/Year].

We are committed to a seamless integration and to upholding the fiduciary standards established by the grantor. We will be reaching out shortly to schedule an introductory meeting to discuss your long-term goals and any immediate needs.

Please find enclosed the formal Notice of Succession and updated contact forms for your records.

Sincerely,

[Signature]

[Name of New Fiduciary]

[Title]

[Organization Name]