

[Date]

[Financial Institution Name]

[Address Line 1]

[Address Line 2]

[City, State, Zip Code]

RE: Beneficial Ownership Identification for [Name of Trust]

To Whom It May Concern,

In connection with the opening/maintenance of the account for the above-referenced Trust, I, [Name of Trustee], acting in my capacity as Trustee, hereby provide the following information regarding the beneficial owners and control persons of the Trust as required by applicable anti-money laundering and "Know Your Customer" regulations.

1. Trust Details:

- Full Legal Name of Trust: [Name of Trust]
- Taxpayer Identification Number (EIN): [Number]
- Legal Address: [Physical Address]

2. Identification of Beneficial Owners (Settlors/Grantors):

The following individual(s) created the trust and/or contributed assets:

- Full Name: [Name]
- Date of Birth: [DOB]
- Residential Address: [Address]
- Identification Number (SSN/Passport): [Number]

3. Identification of Trustees (Control Persons):

The following individual(s) have significant responsibility to manage the Trust:

- Full Name: [Name]
- Date of Birth: [DOB]
- Residential Address: [Address]
- Identification Number (SSN/Passport): [Number]

4. Identification of Beneficiaries:

The following individual(s) are designated to receive benefits from the Trust:

- Full Name: [Name]
- Date of Birth: [DOB]

- Residential Address: [Address]

I certify that the information provided above is true and correct to the best of my knowledge. I agree to notify [Financial Institution Name] promptly of any changes to the beneficial ownership or control structure of this Trust.

Sincerely,

[Signature]

[Printed Name of Trustee]

[Phone Number]

[Email Address]