

[Your Name]
[Your Address]
[City, State, Zip Code]
[Your Email]
[Your Phone Number]

[Date]

[Trustee Name]
[Trustee Address]
[City, State, Zip Code]

RE: Formal Demand Regarding Breach of Duty of Loyalty - [Name of Trust]

Dear [Trustee Name],

I am writing to you in my capacity as a beneficiary of the [Name of Trust], established on [Date of Trust Creation].

As the Trustee, you owe a fiduciary duty of loyalty to the beneficiaries. This duty requires you to administer the trust solely in the interest of the beneficiaries and prohibits you from engaging in self-dealing or allowing personal interests to conflict with those of the trust.

It has come to my attention that you have breached this duty by: [Describe the specific act, e.g., selling trust property to yourself at an undervalue, using trust funds for personal expenses, or favoring your own business interests].

This conduct constitutes a clear violation of [State Statute or Trust Provision]. As a result of these actions, the trust and its beneficiaries have suffered the following losses: [List financial losses or damages].

I hereby demand that you take the following corrective actions within [Number] days of the date of this letter:

- Provide a full and verified accounting of all trust transactions related to [Specific Incident].
- Restore the following assets to the trust: [List assets].
- Compensate the trust for lost profits and interest in the amount of \$[Amount].
- [Optional: Resign immediately as Trustee.]

If these demands are not met by [Deadline Date], I will be forced to pursue all available legal remedies, which may include filing a petition for your removal as trustee, seeking a surcharge for damages, and requesting that the court order you to pay my attorney's fees and legal costs.

Please govern yourself accordingly.

Sincerely,

[Your Signature]

[Your Printed Name]