

[Your Name]
[Your Address]
[Your Phone Number]
[Your Email]

[Date]

[Name of Trustee]
[Address of Trustee]

RE: Formal Demand for Accounting of [Name of Trust]

Dear [Name of Trustee],

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

To date, I have not received a formal accounting regarding the assets, liabilities, receipts, and disbursements of the Trust for the period of [Start Date] to [End Date]. Pursuant to [State/Local Law, e.g., California Probate Code Section 16062], a trustee has a legal fiduciary duty to provide a regular and complete report of the trust administration to the beneficiaries.

This letter serves as a formal demand that you provide a complete written accounting of the Trust within [Number, e.g., 30] days of the date of this letter. The accounting should include, but not be limited to:

- A statement of all trust assets and their current values.
- A detailed list of all income received by the trust.
- An itemized list of all disbursements, expenses, and trustee fees paid.
- Documentation regarding any significant transactions involving trust property.

Failure to provide this information within the requested timeframe may leave me with no alternative but to petition the [Name of County] Probate Court for an order to compel an accounting, for the removal of the trustee, and/or for any other legal remedies available under the law, including the recovery of attorney's fees and costs.

I look forward to receiving the requested documentation by [Deadline Date].

Sincerely,

[Your Signature]

[Your Printed Name]