

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

[Date]

[Name of Fiduciary/Recipient]
[Title]
[Company/Organization Name]
[Address]
[City, State, Zip Code]

RE: FORMAL DEMAND REGARDING IMPROPER DELEGATION OF FIDUCIARY DUTIES

Dear [Name of Fiduciary],

I am writing to you in my capacity as a beneficiary/interested party of [Name of Trust, Estate, or Fund]. It has come to my attention that you have improperly delegated specific discretionary fiduciary duties to [Name of Third Party/Agent] regarding [Specific Matter, e.g., Investment Selection, Asset Allocation, Distribution Decisions].

As a fiduciary, you are legally obligated to personally perform the duties that the settlor or the governing instrument intended for you to exercise. While administrative tasks may be delegated, the core discretionary functions of your role cannot be transferred without explicit authorization or strict adherence to statutory oversight requirements.

Specifically, the following actions are being contested:

- [Detail the specific task that was improperly delegated]
- [Detail the date or timeframe of the delegation]
- [Explain why this task is non-delegable or how the supervision of the agent failed]

This improper delegation constitutes a breach of your fiduciary duty of care and your duty of personal performance. As a result of this delegation, the following harm has occurred: [Describe financial loss or mismanagement].

DEMAND IS HEREBY MADE THAT YOU:

1. Immediately revoke the delegation of authority to [Name of Third Party/Agent].
2. Provide a full written accounting of all actions taken by said agent within [Number] days.
3. Assume personal responsibility for all future discretionary decisions as required by law.
4. Compensate the [Trust/Estate/Fund] for any losses incurred during the period of improper delegation.

Failure to rectify this breach and provide written confirmation of your compliance by [Date] will result in further legal action. This may include a petition for your removal as fiduciary, a surcharge action for damages, and a request for the court to award attorney's fees and costs.

Please govern yourself accordingly.

Sincerely,

[Your Signature]

[Your Printed Name]