

VIA CERTIFIED MAIL - RETURN RECEIPT REQUESTED

Date: [Date]

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

Re: Notice of Breach of Fiduciary Duty regarding [Name of Trust]

Dear [Trustee Name],

I am writing to you in my capacity as a beneficiary of the [Name of Trust]. This letter serves as a formal demand regarding your management and investment of trust assets.

As Trustee, you owe a fiduciary duty to the beneficiaries to manage the trust assets with the care, skill, prudence, and diligence that a prudent person would exercise under similar circumstances. Specifically, you are required to diversify investments and act solely in the best interests of the beneficiaries.

It has come to my attention that you have breached these duties through the following negligent actions:

- [Describe specific negligent act, e.g., failure to diversify assets]
- [Describe specific loss, e.g., concentration in a single high-risk stock]
- [Describe lack of strategy, e.g., failure to rebalance the portfolio since Date]

As a direct result of these investment decisions, the trust has suffered a financial loss of approximately \$[Amount]. This constitutes a breach of the "Prudent Investor Rule."

I hereby demand that you:

1. Provide a full and detailed accounting of all trust investments from [Start Date] to the present within [Number] days.
2. Immediately reallocate trust assets into a diversified, prudent portfolio.
3. Compensate the trust for the losses incurred due to your negligence.

Please provide a written response to this demand by [Deadline Date]. If I do not receive a satisfactory response, I will be forced to pursue formal legal action, which may include a petition for your removal as Trustee and a surcharge action for damages.

I look forward to your prompt attention to this matter.

Sincerely,

[Your Signature]

[Your Printed Name]

[Your Address]

[Your Phone Number]