

VIA CERTIFIED MAIL - RETURN RECEIPT REQUESTED

Date: [Date]

To: [Name of Trust Officer]
[Name of Corporate Trustee/Bank]
[Address]
[City, State, Zip Code]

RE: FORMAL DEMAND REGARDING BREACH OF FIDUCIARY DUTY AND SELF-DEALING

Trust Name: [Full Name of Trust]
Date of Trust: [Date of Trust Agreement]

Dear [Name of Trust Officer or Representative],

I am writing to you in my capacity as a beneficiary of the above-referenced Trust. This letter serves as a formal demand regarding specific instances of self-dealing and breaches of the duty of loyalty committed by [Name of Corporate Trustee] in its capacity as Trustee.

It has come to my attention that the following transaction(s) occurred:

- [Description of Transaction 1: e.g., Investment of trust assets into the Trustee's own proprietary mutual funds with high internal fees.]
- [Description of Transaction 2: e.g., Sale of trust property to an affiliate or subsidiary of the Trustee at below-market value.]
- [Description of Transaction 3: e.g., Payment of excessive or unauthorized fees to the Trustee's own service providers.]

Under [State] law and the terms of the Trust Agreement, a Trustee is strictly prohibited from engaging in self-dealing. As a fiduciary, you are required to manage the Trust assets solely in the interests of the beneficiaries. By engaging in transactions where the Trustee or its affiliates stand to benefit financially at the expense of the Trust, you have breached your fiduciary duty of loyalty.

I hereby demand that [Name of Corporate Trustee] take the following actions within [Number, e.g., 14] business days:

1. Provide a full accounting and detailed explanation of the transactions listed above.
2. Reimburse the Trust for all losses, including lost appreciation and market gains, resulting from these transactions.
3. Disgorge all profits, commissions, and excessive fees earned by the Trustee or its affiliates through these self-dealing acts.
4. Provide a written commitment to cease all future self-dealing activities.

Failure to provide a satisfactory response and a plan for restitution within the timeframe specified will result in my seeking legal remedies. This may include a petition to the court for your removal as Trustee, a surcharge action to recover damages, and a request for an award of attorney's fees and costs.

Please govern yourself accordingly.

Sincerely,

[Your Signature]

[Your Printed Name]

[Your Address]

[Your Phone Number]

[Your Email Address]

cc: [Name of Legal Counsel, if applicable]