[Date]

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

RE: Inquiry regarding the Estate of [Deceased Name] - Account Number: [Account Number]

Dear [Recipient Name],

We have received your inquiry regarding the trust account held at [Financial Institution Name] by the late [Deceased Name]. We offer our condolences for your loss.

To process your request and provide detailed information regarding the status of this account, we require the following documentation:

- A certified copy of the Death Certificate.
- A copy of the Trust Agreement and all amendments.
- Valid government-issued photo identification for all named Successor Trustees.
- The Tax Identification Number (TIN) or Employer Identification Number (EIN) for the Trust.
- Letters of Testamentary or Court Appointment (if applicable).

Once we have received and verified these documents, we will be able to provide the current balance, details on the distribution process, and the necessary forms to transfer or close the account.

Please submit these documents to [Department Name] at [Address/Email] or visit your local branch. If you have any questions, you may contact us at [Phone Number].

Sincerely,

[Your Name/Signature]
[Your Title]
[Financial Institution Name]