

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

[Date]

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

RE: Formal Request for Documentation regarding the [Full Name of Trust]

Dear [Trustee Name],

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

Pursuant to my rights under state law and the terms of the trust agreement, I am formally requesting copies of the following legal and financial documents:

- A complete copy of the original Trust Agreement, including all amendments and codicils.
- The most recent Trust Accounting or financial statement showing assets, liabilities, receipts, and disbursements.
- A list of current trust assets and their estimated values.
- Copies of any appraisals or valuations performed on trust property within the last [Number] months.
- Contact information for any legal or tax professionals currently representing the trust.

Please provide these documents within [Number, e.g., 14 or 30] days of the date of this letter. If any of these documents are unavailable, please provide a written explanation as to why they cannot be produced at this time.

I would prefer to receive these documents via [Email/Certified Mail]. Please let me know if there are any reasonable costs associated with copying these records so that I may provide reimbursement.

Thank you for your prompt attention to this matter.

Sincerely,

[Your Signature]

[Your Printed Name]