

Beneficiary Communication Templates

5 ready-to-customize templates for
trustee-beneficiary communication

Appointment Notification · Annual Accounting Cover · Distribution Approval
Distribution Denial · General Response

Template 1

Appointment Notification Letter

Sent within 60 days of becoming trustee

Fields: [Your Name] · [Trust Name] · [Date] · [Beneficiary Name(s)]

— — —
[Date]

Dear [Beneficiary Name(s)],

My name is [Your Name], and I am writing to inform you that I have been appointed as the successor trustee of the [Trust Name]. I take this responsibility seriously and am committed to keeping you informed throughout the administration of this trust.

What the Trust Holds

The trust currently holds assets including [general overview — e.g., real estate, investment accounts, and other property]. A complete inventory is being prepared and will be available upon request.

Your Rights as a Beneficiary

As a beneficiary, you have the right to:

- Receive an annual accounting of trust assets, income, and expenses
- Request information about the trust and its administration
- Petition the court if you believe the trust is being mismanaged

What to Expect

- **Annual Accounting:** You will receive a complete accounting by March 1st of each year.
- **Response Time:** I will respond to your questions within 10 business days.
- **Communication:** You may reach me at [phone/email] for any questions or concerns.

I welcome your questions and am here to ensure the trust is administered transparently and in accordance with its terms.

Sincerely,

[Your Name], Trustee

Template 2

Annual Accounting Cover Letter

Sent annually with the trust accounting

Fields: [Trust Name] · [Period] · [Beneficiary Name]

— — —
[Date]

Dear [Beneficiary Name],

Enclosed please find the annual accounting for the [Trust Name] for the period [Period]. This accounting provides a complete record of the trust's assets, income, expenses, distributions, and any changes during this period.

Summary Highlights

- Beginning balance: [amount]
- Income received: [amount]
- Expenses paid: [amount]
- Distributions made: [amount]
- Ending balance: [amount]

I am committed to full transparency in the administration of this trust. Please review the enclosed documents carefully. If you have any questions or would like additional detail about any item, please do not hesitate to contact me.

Response Deadline: Please submit any questions or objections within 60 days of receiving this accounting. If I do not hear from you within that period, the accounting will be deemed accepted.

Thank you for your continued trust and cooperation.

Sincerely,

[Your Name], Trustee

Template 3

Distribution Approval Letter

Sent when a distribution is approved

Fields: [Beneficiary Name] · [Amount] · [Purpose] · [Date]

— — —

[Date]

Dear [Beneficiary Name],

I am pleased to inform you that your request for a distribution from the trust has been approved. Below are the details of this distribution:

Amount: [Amount]

Purpose: [Purpose]

HEMS Category: [Health / Education / Maintenance / Support]

Conditions: [Any conditions, or "None"]

Payment Method: [Check / Wire Transfer / Other]

Documentation Request

To maintain proper trust records, please provide receipts or documentation for the above purpose within 30 days of expenditure. This documentation will be filed with the trust's records and included in the next annual accounting.

If you have any questions about this distribution or need to make arrangements for payment, please contact me at your convenience.

Sincerely,

[Your Name], Trustee

Template 4

Distribution Denial Letter

Sent when a distribution is denied — the most important template for lawsuit prevention

Fields: [Beneficiary Name] · [Amount Requested] · [Purpose] · [Date]

— — —

[Date]

Dear [Beneficiary Name],

Thank you for your distribution request. After careful review, I am unable to approve the following request at this time:

Amount Requested: [Amount Requested]

Purpose: [Purpose]

Date of Request: [Date]

Explanation

Your request for [Amount Requested] for [Purpose] was denied because the trust's distribution standard is HEMS — Health, Education, Maintenance, and Support. Living expenses beyond your accustomed standard of maintenance are not covered under the trust's terms. If you have a specific HEMS-qualified need, please submit a new request with details.

Alternative Path

If you believe your request falls within the HEMS standard, or if you have a different need that may qualify, I encourage you to submit a new request with supporting documentation. I am available to discuss the trust's distribution standards and help you understand what types of requests may be approved.

You also have the right to seek independent legal counsel regarding this decision.

Sincerely,

[Your Name], Trustee

Template 5

General Response Template

For general beneficiary inquiries

Fields: [Beneficiary Name] · [Date] · [Regarding]

— — —

[Date]

Dear [Beneficiary Name],

Thank you for your inquiry regarding [Regarding]. I acknowledge receipt of your message on [Date] and want to assure you that it will receive my prompt attention.

Response Timeline

You can expect a full and substantive response within 10 business days. If the matter requires additional time — for example, if I need to consult with the trust's professional advisors — I will notify you of the extended timeline and provide an estimated date of completion.

Additional Context

If there is any additional information or documentation that may help me address your inquiry more effectively, please feel free to share it at your convenience. The more context I have, the better I can serve your needs as a beneficiary.

I value open communication and am committed to keeping you informed about all matters related to the trust's administration.

Sincerely,

[Your Name], Trustee