

**FOR ADULT BENEFICIARY**

**BENEFICIARY NOTICE LETTER**

Date:

To:

Dear \_\_\_\_\_ :

Under the <Trust Name> dated <trust date>, you are named as one of the beneficiaries. I am <the Trustee/one of the Trustees> serving under the Trust.

Under the trust instrument, you are given the right to withdraw any transfers made to the trust within thirty (30) days after each contribution.

A contribution of \$ \_\_\_\_\_ has been made to the trust on \_\_\_\_\_. Your share of the contribution is \$ \_\_\_\_\_.

You may withdraw your share within thirty (30) days from the date of the contribution to the trust by notifying me in writing of your request. This withdrawal right is non-cumulative, so any withdrawal not made this year cannot be carried forward into a future year. However, if you decide not to exercise your withdrawal right for this year, the right to demand a withdrawal for any future contributions is not lost.

If you have any questions or if I can be of any assistance to you, please contact me. Additionally, kindly sign your name on the copy of this letter in the place designated for acknowledgment of receipt of this letter and return the signed copy to me.

Very truly yours,

\_\_\_\_\_  
<Trustee Name(s)>, Trustee

RECEIPT ACKNOWLEDGED:

\_\_\_\_\_

**FOR MINOR BENEFICIARY**

**BENEFICIARY NOTICE LETTER**

Date:

To: \_\_\_\_\_, Guardian

Dear \_\_\_\_\_:

Under the <Trust Name> dated <trust date>, \_\_\_\_\_ is named as one of the beneficiaries. I am <the Trustee/one of the Trustees> serving under the Trust.

Under the trust instrument, you, on behalf of \_\_\_\_\_, are given the right to withdraw any transfers made to the trust within thirty (30) days after each contribution.

A contribution of \$ \_\_\_\_\_ has been made to the trust on \_\_\_\_\_. \_\_\_\_\_'s share of the contribution is \$ \_\_\_\_\_.

You may withdraw such child's share within thirty (30) days from the date of the contribution to the trust by notifying me in writing of your request. This withdrawal right is non-cumulative, so any withdrawal not made this year cannot be carried forward into a future year. However, if you decide not to exercise such child's withdrawal right for this year, the right to demand a withdrawal for any future contributions is not lost.

If you have any questions or if I can be of any assistance to you, please contact me. Additionally, kindly sign your name on the copy of this letter in the place designated for acknowledgement of receipt of this letter and return the signed copy to me.

Very truly yours,

\_\_\_\_\_  
<Trustee Name(s)>, Trustee

RECEIPT ACKNOWLEDGED:

\_\_\_\_\_  
, Guardian