**INSERT FIRM LETTERHEAD HERE**

***BENEFICIARY PACKAGE
COVER LETTER (CLOSINGS, WHEN MAILED)***

November 21, 2024

TRUSTEE/CLIENT NAME

TRUSTEE/CLIENT ADDRESS

CITY, STATE ZIP

 Re: Instructions for Signing Your Estate Administration Documents

Dear TRUSTEE/CLIENT NAME:

 Thank you for choosing the LAW FIRM NAME to help you and your family with your estate administration needs. Pursuant to your request, our firm has prepared the following estate administration documentation:

1. Informal Settlement Agreement
2. Certification of Trust
3. Affidavit of Death of Trustee
4. Quitclaim Deed

 Although we have been careful to follow your directions and to incorporate in the documents all matters which we discussed, there is always the possibility of a failure in communication. Should there be any errors or misunderstandings, please contact us immediately.

 If everything meets your approval, please proceed as follows:

1. **Informal Settlement Agreement** – Please find enclosed your Informal Settlement Agreement. Please sign and date on the line above your name. Once you have executed this document, make a copy for your records and return the original page containing your signature to our office in the self-addressed, stamped envelope provided. Once we receive the settlement agreements from all the beneficiaries, we will be ready to disburse your share to you. [EXHIBITS 123/124]
2. **Certification of Trust** – Please sign and date before a notary public. Please make a copy of the signature and notary pages and return them to us in the enclosed envelope for our record. This Certification of the Personal Asset Trust proves to banks, financial institutions, title companies, etc., that you are now the trustee. For example, you should show this certification to a bank, and allow them to copy it if they desire, and instruct the bank to change title (ownership) to the account in the manner described on this Certification of Trust. In addition, the bank should be told to use the new trust tax identification number indicated on the certification for each trust account.

1. **Affidavit of Death of Trustee** – Please sign (with a blue ink pen) where indicated, before a notary public. Also sign and date the Preliminary Change of Ownership form, Change of Ownership Statement, and the Claim for Reassessment form where indicated. The reason for the blue ink pen is so you can always tell an original from a copy.
2. **Quitclaim Deed** – Please sign (with a blue ink pen) where indicated, before a notary public. Also sign and date the Preliminary Change of Ownership form where indicated. The reason for the blue ink pen is so you can always tell an original from a copy.

 Once you have executed the Affidavit of death of Trustee and Quitclaim Deed documents, make a copy for your records, send the originals to our office along with a check for $\_\_\_\_\_\_\_\_\_ payable to DEED PROCESSING COMPANY, in the envelope provided for the recording.

 We realize that there is quite a lot to review and absorb here, so again please do not hesitate to contact us to assist you.

 We look forward to seeing you soon and continuing to help you with your estate planning matters.

Sincerely,

FIRM NAME

ATTORNEY NAME

Attorney at Law

ATTY INITIALS/admin initials

Enclosures