**INSERT FIRM LETTERHEAD HERE**

***BENEFICIARY PACKAGE OPENING LETTER***

***(without Trust Certification, already prepared)***

November 21, 2024

TRUSTEE/CLIENT NAME

TRUSTEE/CLIENT ADDRESS

CITY, STATE ZIP

**Re: ESTATE OF DECEDENT NAME, deceased**

Dear TRUSTEE/CLIENT NAME:

We would again like to express our condolences for your loss. We understand that this is a very difficult time, and we would like to make this process as easy as possible for you.

As it may have been explained to you during your meeting, our department will work as a team to assist you through this process. I am the attorney who will oversee the legal aspects of the trust administration process, along with STAFF MEMBER(S) NAME(S), who coordinate the day-to-day paperwork.

The trust administration process initially involves the gathering of documentation and other information for all assets held in trust, individually or jointly with another. You will recall that we asked you to bring as much of this information as you could to the first meeting. Any further asset information that we still need from you at this time will be described on the enclosed “Client To-Do List – Asset Collection,” as discussed below.

Please find enclosed the following items, each of which requires your signature and/or review:

1. Client To-Do List – Asset Collection: This is a list of documents we still need from you in order to complete the administration process. **It is very important that you provide our office with these items as soon as they become available.** [EXHIBIT 61]

2) Authorization Form: This allows our law firm to request information from banks, financial institutions, real estate title companies, etc. regarding the assets or other issues throughout this matter. **Please sign the authorization form and return it in the enclosed envelope.** [EXHIBIT 64]

3) Certification of Trust: We already provided you with the executed Certification of Trust, which 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 the 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. [EXHIBITS 21-23]

4) General Trustee Procedures: This letter summarizes for you the steps involved in the trust administration process. [EXHIBIT 67]

5) Fiduciary Statement Regarding Value of Personal Property: This form breaks down personal property into specific categories, and helps us determine whether a professional appraisal is necessary. **Please complete, sign, date, and return the Statement in the enclosed envelope.** [EXHIBIT 63]

6)Authorization to Release Medical Information (HIPAA) This document enables the other Trustees and/or Successors (under the Living Trust) to access your personal health information, only for limited purposes. **Please sign the document before a notary public, make a copy of the signature pages for our records and mail it to our office in the envelope provided.** [EXHIBITS 47 & 48]

Please call if you have any questions regarding these or any other issues that arise throughout this process.

Sincerely,

FIRM NAME

ATTORNEY NAME

Attorney at Law

ATTY INITIALS/admin initials

Enclosures