

[Date]

[Client Name]

[Client Address]

[City, State, Zip Code]

Re: Engagement for Trust Administration Services - [Name of Trust]

Dear [Client Name],

This letter confirms that [Law Firm/Entity Name] has been retained to assist you in your capacity as Trustee in the administration of the [Full Name of Trust] dated [Date of Trust].

Scope of Services

Our services will include, but are not limited to:

- Reviewing the trust instrument and advising on your fiduciary duties.
- Assisting with the identification, collection, and valuation of trust assets.
- Providing guidance on the payment of debts, expenses, and taxes.
- Preparing necessary notices to beneficiaries and legal authorities.
- Assisting with the distribution of assets according to the trust terms.

Fees and Billing

Our fees for these services will be based on [Hourly Rates / A Fixed Fee of \$_____]. Out-of-pocket expenses such as filing fees, postage, and travel will be billed separately. Statements will be sent [Monthly/Quarterly] and are due upon receipt.

Client Responsibilities

As Trustee, you agree to provide all necessary financial records, asset information, and documentation in a timely manner. You remain responsible for all final decisions regarding the investment and distribution of trust assets.

Termination

Either party may terminate this engagement at any time by providing written notice. Upon termination, all earned fees and expenses incurred up to that date shall become immediately due and payable.

Please sign and return a copy of this letter to indicate your acceptance of these terms.

Sincerely,

[Attorney/Firm Representative Name]

[Firm Name]

ACKNOWLEDGED AND AGREED:

[Client Name], Trustee

Date: _____