

Date: [Insert Date]

To: [Insert Trustee Name]
[Insert Address of Trustee]
[Insert City, State, Zip Code]

Re: Irrevocable Trust and Wealth Transfer Apportionment Instructions

Dear [Insert Trustee Name],

This letter serves as a formal instruction regarding the apportionment and distribution of assets held within the [Insert Full Name of Trust], established on [Insert Date of Trust Creation].

Pursuant to my powers as Grantor/Settlor and in accordance with the terms defined in the Trust Agreement, I hereby direct the apportionment of the trust estate for the purposes of wealth transfer as follows:

1. Identification of Beneficiaries and Percentage Allocation

- **Beneficiary Name:** [Insert Name] - **Allocation:** [Insert %]
- **Beneficiary Name:** [Insert Name] - **Allocation:** [Insert %]
- **Beneficiary Name:** [Insert Name] - **Allocation:** [Insert %]

2. Specific Asset Apportionment (If Applicable)

The following specific assets shall be transferred to the designated beneficiaries regardless of the percentage allocations listed above:

- **Asset Description:** [Insert Asset Details] - **To:** [Insert Beneficiary Name]
- **Asset Description:** [Insert Asset Details] - **To:** [Insert Beneficiary Name]

3. Transfer Schedule and Conditions

The transfer of the aforementioned wealth shall be executed under the following timeline or conditions: [Insert Conditions, e.g., Upon my death, when a beneficiary reaches age 30, or immediate transfer].

4. Tax and Expense Apportionment

All transfer taxes, administrative fees, and legal costs associated with this distribution shall be: [Select: Paid out of the residual trust estate / Pro-rated against each beneficiary's share].

Please acknowledge receipt of these instructions and confirm that the trust records have been updated to reflect this apportionment. This letter is intended to clarify my intent and provide guidance for the administration of the Trust in accordance with its irrevocable status.

Sincerely,

[Your Signature]

[Insert Your Printed Name]

Grantor/Settlor

Acknowledgment of Trustee:

I, [Insert Trustee Name], acting as Trustee, hereby acknowledge receipt and understanding of these apportionment instructions.

Signature: _____ Date: _____