

[Date]

[Beneficiary Name]

[Address Line 1]

[Address Line 2]

RE: Delivery of Term Life Insurance Policy and Beneficiary Confirmation

Dear [Beneficiary Name],

We are writing to formally deliver the details regarding the Term Life Insurance policy held by **[Name of Trust]**. This policy has been established to provide financial protection and fulfill the objectives of the Trust.

Policy Details:

- **Insurance Company:** [Company Name]
- **Policy Number:** [Policy Number]
- **Coverage Amount:** [Dollar Amount]
- **Policy Term:** [Number of Years]

This letter serves as official notification that you are designated as a primary beneficiary of this policy. In the event of the insured's passing during the policy term, the proceeds will be distributed according to the provisions set forth in the [Name of Trust Agreement].

Please review the enclosed policy documents carefully. We recommend that you keep this letter and the attached copies in a secure location. It is also important that you notify the Trustee of any changes to your legal name, contact information, or address to ensure seamless communication in the future.

If you have any questions regarding the terms of the trust or the specifics of this insurance policy, please contact our office at [Phone Number] or [Email Address].

Sincerely,

[Signature]

[Printed Name of Trustee]

Trustee of [Name of Trust]

Enclosures: Copy of Term Life Insurance Policy