

[Date]

[Trustee Name]

[Trustee Address]

[City, State, Zip Code]

Re: Status of Asset Transfers for [Name of Trust]

Dear [Trustee Name],

I am writing to provide an initial status update regarding the transfer of assets into the above-referenced Trust. The purpose of this letter is to track which assets have been successfully retitled and which are still pending.

Completed Transfers:

- [Asset Description 1, e.g., Real Estate Property Address]
- [Asset Description 2, e.g., Bank Account Name and Last 4 Digits]

Pending Transfers:

- [Asset Description 3] - Status: [e.g., Paperwork submitted, awaiting confirmation]
- [Asset Description 4] - Status: [e.g., Need signature from co-owner]

Required Actions:

To finalize the remaining transfers, we require the following items: [List specific documents or information needed].

Please review this list and confirm if there are any additional assets that should be included in the funding process. If you have any questions, please contact my office.

Sincerely,

[Your Name/Signature]

[Your Title/Role]