

[Date]

[Trustee Name]

[Trustee Address]

[City, State, Zip Code]

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

Account Number: [Brokerage Account Number]

Dear [Trustee Name],

This letter is to provide a formal update regarding the transfer of assets into the above-referenced trust account. Our records indicate that the transfer process initiated on [Date Process Started] is currently [Status: e.g., Pending / In Progress / Partially Completed].

Transfer Details:

- **Delivering Institution:** [Name of Sending Firm]
- **Assets Received:** [List specific stocks, bonds, or cash amounts already moved]
- **Pending Assets:** [List assets still awaiting transfer]

Current Status Notes:

[Insert specific details, such as: "We are currently awaiting final clearance from the delivering firm" or "Additional documentation is required for the following mutual funds: ..."]

We are monitoring this transfer closely to ensure all assets are correctly registered in the name of the Trust. We anticipate the remaining steps to be completed by [Estimated Completion Date].

If you have any questions or have received conflicting information from the delivering institution, please contact your Account Manager at [Phone Number] or [Email Address].

Sincerely,

[Sender Name]

[Title/Department]

[Brokerage Firm Name]