

[Your Name/Company Name]
[Your Address]
[City, State, Zip Code]
[Date]

[Recipient Name]
[Trust Department/Bank Name]
[Address]
[City, State, Zip Code]

RE: Referral for Successor Corporate Trustee Services - [Name of Trust]

Dear [Recipient Name],

I am writing to formally refer the [Full Name of Trust], dated [Date of Trust], for your consideration as a successor corporate trustee.

The current trustee, [Name of Current Trustee], is planning to transition out of this role due to [Reason: e.g., retirement, resignation, or the need for professional management]. After reviewing your firm's reputation for fiduciary excellence, I believe your institution would be a suitable fit for managing the administrative and investment needs of this trust.

Trust Overview:

- **Grantor:** [Name of Grantor]
- **Current Beneficiaries:** [Names of Primary Beneficiaries]
- **Approximate Asset Value:** [Estimated Value]
- **Primary Asset Types:** [e.g., Cash, Marketable Securities, Real Estate]

Enclosed/Attached please find a copy of the Trust Agreement and a current statement of assets for your initial review. The beneficiaries are looking for a trustee who can provide [e.g., long-term stability, tax reporting, and impartial distributions].

Please let me know your interest in accepting this appointment and what additional documentation or KYC (Know Your Customer) information you require to proceed with the onboarding process.

I look forward to hearing from you.

Sincerely,

[Your Signature]
[Your Printed Name]
[Your Title/Relationship to Trust]