

Date: [Date]

[Trust Officer Name]

[Trust Company/Bank Name]

[Address]

[City, State, Zip Code]

RE: Referral for Trust Services - Case No: [Court Case Number]

Dear [Trust Officer Name],

I am writing to formally refer the matter of **[Ward/Incapacitated Person's Name]** to your institution for professional trust management services.

By order of the **[Name of Court]** dated **[Date of Order]**, I have been appointed as the **[Guardian/Conservator]** for the individual named above. The court has determined that a **[Special Needs Trust/Medicare Set-Aside/Management Trust]** is required to protect the assets of the Ward.

The assets requiring management consist of **[Brief description of assets, e.g., personal injury settlement, inheritance, or real estate proceeds]** totaling approximately **[\$[Amount]]**.

Please find enclosed the following documentation for your review:

- Certified Copy of the Letters of Guardianship/Conservatorship
- Court Order Authorizing the Creation of the Trust
- Copy of the Proposed or Executed Trust Agreement
- **[Any additional financial statements or medical assessments]**

We are requesting that **[Trust Company Name]** serve as the **[Corporate Trustee/Co-Trustee]**. Please review the enclosed materials and provide a formal acceptance of this appointment, along with your fee schedule, so that we may submit the final documents to the court for approval.

If you require any additional information to complete your intake process, please contact me directly at **[Phone Number]** or **[Email Address]**.

Sincerely,

[Signature]

[Your Printed Name]

[Your Title, e.g., Court Appointed Guardian/Attorney]