Date: [Date]

To: [Name of Trustee]
[Address of Trustee]
[City, State, Zip Code]

Re: Notice of Age-Based Distribution for [Name of Beneficiary]

Dear [Name of Trustee],

Pursuant to the terms and conditions set forth in the [Name of Trust, e.g., John Doe Revocable Living Trust] dated [Date of Trust agreement], I am writing to formally instruct you to initiate a partial distribution of trust assets.

The beneficiary, [Name of Beneficiary], reached the age of [Age, e.g., 25] on [Birth Date]. According to Article [Number/Letter] of the Trust instrument, the beneficiary is entitled to receive [Percentage, e.g., 25%] of the principal and undistributed income of their share of the trust estate upon reaching this milestone.

Please perform the following actions:

- Calculate the current fair market value of the beneficiary's share of the trust.
- Liquidate or transfer in-kind assets totaling the required distribution amount.
- Coordinate with the beneficiary to determine the preferred method of delivery (e.g., wire transfer or physical check).

Please provide a summary statement showing the valuation used and the specific assets distributed for our records. If you require any additional documentation or identification from the beneficiary to process this request, please let me know immediately.

Thank you for your prompt attention to this matter.

Sincerely,

[Your Name]
[Your Title, e.g., Grantor or Co-Trustee]
[Your Phone Number]
[Your Email Address]