Date: [Insert Date]

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

Re: Distribution of Assets from [Full Name of Trust] following the death of [Name of Deceased Spouse]

Dear [Name of Trustee],

As the surviving spouse and a beneficiary of the [Full Name of Trust], dated [Date Trust was Established], I am writing to formally provide instructions regarding the distribution and allocation of trust assets following the passing of [Name of Deceased Spouse] on [Date of Death].

Pursuant to the terms set forth in Article [Insert Article Number] of the Trust Agreement, I request that you proceed with the following:

1. Allocation to Sub-Trusts: Please take the necessary steps to divide the trust estate into the [e.g., Marital Trust, Family Trust, and/or Survivor's Trust] as mandated by the trust provisions.

2. Specific Asset Distribution: I request the distribution of the following specific assets to my personal name/account:

- [Asset Description 1 / Account Number]
- [Asset Description 2 / Account Number]

3. Income Payments: Please arrange for the regular distribution of [all net income / a fixed amount of $_____] to be paid to me on a [monthly/quarterly] basis, effective immediately.

4. Principal Requests: At this time, I [am / am not] requesting a discretionary distribution of principal for my health, education, maintenance, and support.

Please provide a current inventory of trust assets and a timeline for when these distributions and allocations will be completed. I have attached a certified copy of the death certificate for your records.

Thank you for your prompt attention to this matter.

Sincerely,

[Signature]
[Print Name of Surviving Spouse]
[Your Address]
[Your Phone Number]