Date: [Insert Date]

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

Re: Letter of Instruction regarding the [Name of Trust]

Dear [Trustee Name],

This letter serves as a formal instruction regarding the succession and distribution of business assets held within the [Name of Trust] following the occurrence of [Triggering Event, e.g., my passing or disability].

Pursuant to my authority as Settlor, I direct you to manage the distribution of [Name of Business/Company] as follows:

1. Transfer of Ownership Interests
Please transfer [Percentage]% of the membership interests/shares to [Beneficiary Name 1] and [Percentage]% to [Beneficiary Name 2].

2. Management Succession
It is my instruction that [Name of Designated Successor] be appointed as the primary manager/CEO of the business operations. I request that you facilitate any necessary board resolutions or filings to formalize this transition.

3. Buy-Sell Provisions
In the event a beneficiary wishes to liquidate their interest, please refer to the [Date] Buy-Sell Agreement, which dictates the valuation method and right of first refusal for existing partners.

4. Distribution of Liquid Assets
Any retained earnings or business reserve accounts designated for distribution should be allocated to the beneficiaries in proportion to their new ownership stakes after all business debts and taxes are settled.

5. Professional Consultation
I authorize you to engage [Name of Accountant or Law Firm] to assist in the valuation and tax-efficient transfer of these assets, with fees to be paid by the Trust.

Please acknowledge receipt of these instructions and confirm your intent to act in accordance with these wishes upon the triggering event.

Sincerely,

[Your Signature]
[Your Printed Name]
Settlor/Grantor

cc: [Successor Manager Name], [Legal Counsel Name]