Date: [Insert Date]

To: [Beneficiary Name]
Address: [Beneficiary Address]
City, State, Zip: [City, State, Zip]

Subject: Letter of Instruction regarding [Estate/Account/Trust Name]

Dear [Beneficiary Name],

I am writing to you in my capacity as the [Executor/Trustee/Administrator] of the [Name of Estate/Trust]. The purpose of this letter is to provide you with formal instructions and information regarding your interest in the aforementioned entity.

1. Identification of Assets
As a named beneficiary, you are entitled to the following: [List specific assets, percentage of estate, or dollar amount].

2. Required Documentation
To facilitate the distribution process, please provide the following documents by [Insert Date]:

- Completed Distribution Election Form (enclosed)
- Copy of government-issued photo identification
- Completed W-9 or W-8BEN tax form
- [Insert any other required document]

3. Method of Distribution
Distributions will be made via [Check/Wire Transfer/Internal Transfer]. If you prefer a wire transfer, please provide your banking details using the attached secure form.

4. Timeline
We anticipate the distribution process to be completed by [Insert Estimated Date], provided all documentation is received in a timely manner.

5. Tax Implications
Please be advised that we cannot provide tax or legal advice. You are encouraged to consult with a professional advisor regarding the tax consequences of this distribution.

If you have any questions regarding these instructions, please contact me at [Phone Number] or [Email Address].

Sincerely,

[Signature]
[Printed Name]
[Title: Executor/Trustee/Administrator]