

[Your Name/Law Firm Name]
[Address Line 1]
[Address Line 2]
[City, State, Zip Code]
[Phone Number]
[Email Address]

[Date]

[Expert's Name]
[Expert's Firm Name]
[Address Line 1]
[City, State, Zip Code]

RE: Formal Letter of Instruction - Forensic Document Examination

Matter: [Name of Trust, e.g., The John Doe Revocable Trust]

Case Number: [If applicable]

Dear [Expert's Name],

I am writing to formally instruct you to act as an independent forensic document examiner to provide an expert opinion regarding the authenticity of a signature on a disputed Trust Amendment.

1. Background

The dispute concerns the [Number, e.g., Second] Amendment to the [Name of Trust], dated [Date of Disputed Document]. The beneficiaries contend that the signature of the Settlor, [Name of Settlor], is a forgery/non-authentic.

2. Documents Provided

Accompanying this letter are the following documents for your analysis:

- **Item A (Questioned Document):** A [Copy/Original] of the Trust Amendment dated [Date].
- **Item B (Known Standards):** [Number] examples of known signatures of [Name of Settlor] taken from [Description of sources, e.g., original Will, passport, bank checks] dated between [Year] and [Year].

3. Scope of Work

You are requested to perform the following tasks:

- Conduct a forensic side-by-side comparison of the Questioned Document signature against the Known Standards.
- Determine whether the signature on the Questioned Document was authored by [Name of Settlor].
- Identify any evidence of simulation, tracing, or hesitation.

- Prepare a detailed written report of your findings, including your methodology and conclusion.

4. Deadlines

Please provide your preliminary findings by [Date]. If a full formal report is required for court submission, the deadline is [Date].

5. Fees and Terms

Your services will be remunerated in accordance with your fee schedule dated [Date]. We acknowledge receipt of your retainer requirement of \$[Amount].

Please confirm receipt of these instructions and the enclosed documents.

Yours sincerely,

[Signature]

[Your Printed Name]