[Date]

[Heir Tracer Name/Agency Name]
[Address Line 1]
[Address Line 2]
[City, State, Zip Code]

RE: Letter of Instruction - Formal Search for Beneficiaries
Trust Name: [Full Name of Trust]
Grantor/Deceased: [Name of Grantor]

Dear [Contact Person Name],

I am writing to you in my capacity as the Trustee of the [Name of Trust]. I am formally engaging your services to locate and identify the current whereabouts and contact information of the following potential beneficiaries or their legal heirs:

- [Missing Person Name 1], last known address [Last Known Address].
- [Missing Person Name 2], approximate age [Age], last known location [Location].

Scope of Work:
Please conduct a comprehensive search to provide the following:

1. Current residential address and telephone number.
2. Social Security Number (if available for tax reporting).
3. Verification of life status (Death Certificate if deceased).
4. Identification of issue/lineal descendants if the original beneficiary is deceased.

Deadlines and Reporting:
Please provide an initial status report by [Date]. A final notarized affidavit of your findings must be submitted no later than [Final Deadline Date] to facilitate the final distribution of trust assets.

Fees and Expenses:
The agreed-upon fee for this service is [Amount/Rate]. Any expenses exceeding [Budget Limit] must be approved in writing by the Trustee prior to being incurred.

Please acknowledge receipt of these instructions and confirm your acceptance of this assignment by signing below and returning a copy to my office.

Sincerely,

[Your Signature]

[Your Printed Name]
Trustee of the [Name of Trust]

[Your Phone Number]
[Your Email Address]