

[Date]

[Beneficiary Name]

[Beneficiary Address]

[City, State, Zip Code]

Re: Succession of Trustee for the [Name of Trust]

Dear [Beneficiary Name],

I am writing to formally notify you that I have been retained by [Name of Successor Trustee] in their capacity as the Successor Trustee of the [Full Name of Trust], following the [death/resignation/incapacity] of [Name of Prior Trustee].

The purpose of this letter is to clarify the nature of my legal representation. Please be advised that I represent [Name of Successor Trustee] solely in their fiduciary role as Successor Trustee. I do not represent you, or any other beneficiary, in an individual capacity regarding your personal interests in this Trust.

While I will be communicating with you regarding the administration of the Trust, providing required accountings, and issuing formal notices, our interactions do not create an attorney-client relationship between us. My duties are owed strictly to the Successor Trustee to ensure the Trust is administered according to its terms and applicable law.

Because I do not represent you, I cannot provide you with legal advice. If you have questions regarding your specific rights as a beneficiary, the tax implications of your distribution, or if you feel your interests are not being protected, you are strongly encouraged to seek independent legal counsel.

Please acknowledge that you have received this notice by signing below and returning a copy to my office.

Sincerely,

[Attorney Name]

[Law Firm Name]

ACKNOWLEDGMENT OF NON-REPRESENTATION

I, [Beneficiary Name], acknowledge that I have read this letter and understand that [Attorney Name] and [Law Firm Name] represent the Successor Trustee only, and do not represent me as a beneficiary.

[Beneficiary Signature]

[Date]