

[Date]

[Beneficiary Name]
[Beneficiary Address]
[City, State, Zip Code]

Re: Notice of Representation regarding the Estate/Trust of [Name of Decedent/Grantor]

Dear [Beneficiary Name],

Please be advised that [Law Firm Name/Attorney Name] has been retained to represent [Fiduciary Name] in [his/her/its] capacity as the [Executor/Administrator/Trustee] of the [Estate/Trust] of [Name of Decedent/Grantor].

The purpose of this letter is to formally notify you of our role and to clarify the nature of our professional relationship. We represent [Fiduciary Name] exclusively. We do not represent you, nor do we represent your individual interests as a beneficiary of this [Estate/Trust].

Because we do not represent you, an attorney-client relationship does not exist between this firm and you. Any information you provide to us is not protected by attorney-client privilege. We cannot provide you with legal advice regarding your rights, the value of your interest, or the tax consequences of any distributions.

We strongly recommend that you retain independent legal counsel to represent your interests, review any documents provided to you, and advise you throughout the administration process.

While we will communicate with you regarding the status of the administration and provide required formal notices or accountings, such communications are made solely on behalf of our client, the [Fiduciary Title].

Please sign the enclosed copy of this letter to acknowledge that you have received this notice and understand that we do not represent you.

Sincerely,

[Attorney Name]
[Law Firm Name]

ACKNOWLEDGMENT:

I, [Beneficiary Name], acknowledge receipt of this letter and understand that [Law Firm Name] represents the [Fiduciary Title] only and does not represent me in this matter.

Signature: _____ Date: _____