

[Your Name]
[Your Address]
[Your Phone Number]
[Your Email Address]

[Date]

[Executor/Trustee Name]
[Address]
[City, State, Zip Code]

**RE: Notice of Fiduciary Duties and Formal Request for Accounting of the Estate of
[Deceased Name]**

Dear [Executor/Trustee Name],

I am writing to you in my capacity as a beneficiary of the Estate of [Deceased Name].

As the appointed [Executor/Trustee], you hold a fiduciary position. This role requires you to act in the best interests of the beneficiaries, manage estate assets prudently, and provide full transparency regarding the administration of the estate. These duties are mandated by law and the terms of the [Will/Trust].

To ensure I am fully informed regarding the current status of the estate and its assets, I am formally requesting a complete and detailed accounting of the estate from [Date of Death or Date of Last Accounting] to the present date.

Please include the following in the accounting:

- A detailed list of all assets currently held by the estate.
- A record of all income received by the estate.
- An itemized list of all disbursements, debts paid, and administrative expenses incurred.
- The current balance of all estate bank or investment accounts.

I request that this information be provided to me within [Number, e.g., 30] days of the date of this letter. If there are any reasons why this timeline cannot be met, please notify me in writing immediately.

Thank you for your prompt attention to this matter and for fulfilling your obligations to the beneficiaries.

Sincerely,

[Your Signature]

[Your Printed Name]