

DATE

Address

RE: Estate/Trust

Dear M.:

Thank you for notifying XXX [of ____] that we are a beneficiary of the Estate of ____/beneficiary under the Trust of _____. *Please note that because estate and trust matters for all chapters of XXX are centralized, all correspondence and distributions should be sent to this office in XXX and directed to my attention.* You may be assured, however, that we will allocate 100% of this bequest/gift according to Ms. _____'s wishes.

We are very thankful that Ms. _____ remembered XXX in her estate plans and would like the opportunity to contact people important to her to express our thanks. Do you know of anyone who might appreciate hearing from us?

In order for us to maintain complete estate files and allocate this gift as Ms. _____ intended, we request a copy of the Will/Trust that identifies XXX's interest. If (Because)our organization is a residuary beneficiary of the estate, we would appreciate receiving a copy of the inventory and all accountings for the estate/trust when they are prepared OR [informal trust accounting at the conclusion of the trust administration]

If XXX is likely to receive any portion of its distribution in the form of real estate, please notify me immediately. We will need to visit the property and prepare an environmental assessment before taking title. Please do not automatically transfer ownership of any assets, including real estate and securities, without first notifying me.

It is the strong preference of XXX that, wherever possible, the Trustee/Executor immediately liquidate assets, particularly securities, in order to preserve principal.

Finally, we would encourage you, wherever practical and allowable, to correspond with us by email. Please do not feel that you need to follow up those emails with a hard copy unless required by law or your own policies.

Thank you for your assistance in this matter. We look forward to working with you on this estate/trust. Enclosed are our W-9 and an IRS Determination Letter.

Sincerely yours,

Enclosures