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| --- | --- |
| From:  Succeeding-Beneficiary: Name  c/o 1234 Your Address Street  City / Town, State [12345]  Phone: (xxx) xxx-xxxx  **Succeeding Beneficiary** | To:  Original-Beneficiary: Name  c/o 1234 Their Address Street  City / Town, State [54321]  **Beneficiary** |

Date: \_\_\_\_\_\_Date Goes Here\_\_\_\_\_\_

Dear Original-Beneficiary: Name,

I am in receipt of your letter informing me of your desire concerning the transfer of equitable ownership in the Trust Name Here.

It is my intent to accept equitable ownership in this Private Trust as a Beneficiary, and I will follow the instructions necessary for proper transfer of your Units of Equitable Ownership. I do hope this letter will satisfy the Board of Trustees concerning said transfer.

Should I have any questions or concerns that arise, I require the assistance of the Board of Trustees to affect this transfer smoothly.

Thank you very much.

Sincerely,

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Succeeding-Beneficiary: Name