

[date]

To: [Beneficiary email address]

Dear [Beneficiary name],

**[Trust name] (the "Trust")**

We write to advise that you are a discretionary beneficiary of the Trust.

A discretionary beneficiary has no automatic right or entitlement to any money or property from the Trust, only to be considered by the trustees for a distribution on a discretionary basis.

The current trustees of the Trust are:

1. [Trustee 1]
2. [Trustee 2]
3. [Trustee 3]

Contact email: [insert]

Under section 52 of the Trust Act 2019 you are entitled to request a copy of the terms of the Trust or the Trust information. It is important to note, however, that although you can request information, the trustees do not have to automatically give any information requested but can make case by case decisions. The trustees are not required to give reasons for any trustee decisions.

There will be costs associated with these requests and these will need to be paid for before the request can be actioned.

Yours sincerely,

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**[insert name]**

Trustee of the Trust