

_____, 20____

Name:

Address:

Re: Request for copies of documents and other information pertaining to
The Trust and/or Estate _____

**Protected Under Rule 408 of the Federal and Utah Rules of Evidence as
Inadmissible Compromise and Settlement Proposal(s) on Disputed Claims**

Dear _____,

As an interested party in the above-referenced, I would like to request a copy of any wills, trusts, powers of attorney, or other estate planning documents in which I am referenced.

Further, I would respectfully request that a full and complete accounting of all estate and/or trust assets including, but not limited to, receipts, distributions, expenses, and fees (along with accompanying statements) for all bank accounts, investment accounts/portfolios, stock interests, etc. Furthermore, said accounting shall include a summary of all asset interests (whether currently held within the Trust or in the Probate Estate), including, but not limited to, the assets listed above and real estate interests. Said accounting should include fair value estimates.

It is my request that you contact me within seven (7) days of the above date and communicate your willingness to provide the information requested herein (and provide a reasonably timeline within which the request for an accounting will be fulfilled). In the event that a satisfactory communication has not been received by said date, I will have no choice but to take formal action to protect my rights and interests in these matters.

If you have any questions or concerns, please do not hesitate to contact me at _____ or by e-mail at _____ (email). I look forward to working with you in helping our clients to reach a fair and expeditious resolution of the matters referenced herein.

Sincerely,

Name: