

LETTER OF WISHES

To: _____

This Letter of Wishes is provided to guide and assist the trustees of the Trust established by me (the Settlor) in the administration and distribution of the Trust assets. It is intended to be a non-binding statement of my preferences and is intended to be read and considered together with the Trust Deed and any relevant laws. Nothing in this Letter shall override or modify the terms of the Trust Deed or the powers and discretions conferred therein.

Settlor's Personal Information:

Full Name: _____

Date of Birth: _____

Address: _____

Trust Information:

Name of Trust: _____

Date of Trust Deed Execution: _____

Trustee(s): _____

Beneficiaries and Wishes:

The following individuals or entities are beneficiaries under the Trust. My wishes regarding distributions and benefits to each are set out below. These wishes are to be considered by the Trustee(s) but do not limit their discretion or duties under the Trust Deed.

1. Beneficiary Name: _____

Relationship to Settlor: _____

Specific Wishes / Instructions: _____

2. Beneficiary Name: _____

Relationship to Settlor: _____

Specific Wishes / Instructions: _____

General Instructions to Trustees:

1. I encourage the Trustee(s) to exercise their discretion with fairness, prudence, and care, keeping in mind the best interests of the beneficiaries. 2. Income and capital distributions may be made in such proportions and at such times as the Trustee(s) deem appropriate. 3. The Trustee(s) should consider the health, education, maintenance, and support of the beneficiaries in distribution decisions. 4. I request that the Trustee(s) keep the beneficiaries reasonably informed about the Trust and its administration. 5. If any beneficiary predeceases me or is unable to receive a distribution, the

Trustee(s) may distribute to their issue or as otherwise permitted under the Trust Deed. 6. The Trustee(s) shall consider tax implications and seek professional advice as necessary. 7. This Letter is not legally binding but is intended to provide guidance consistent with the Settlor's intentions.

Additional Notes / Comments:

Settlor's Declaration:

I, the undersigned Settlor, affirm that this Letter of Wishes expresses my current preferences and guidance to the Trustee(s) of the Trust. I understand that this document is not legally binding and does not amend or modify the Trust Deed. I reserve the right to update or revoke this Letter at any time by executing a subsequent Letter of Wishes or other written communication.

Settlor's Signature

Trustee's Signature

Signature: _____

Signature: _____

Original source of this document:

<https://letter247-us.com/letter-of-wishes/>

Did you find this template helpful?

Find more updated templates at:

<https://letter247-us.com/>

[View more templates](#)

This template is intended exclusively for personal, non-commercial use.
If distributed or published, the source must be mentioned.

This template is provided for guidance only and does not constitute legal advice.
It is recommended to consult a legal professional for each specific case.