

Sample Crummey Notice

Date of Notice

Trust Name, Trust Date

To: **Beneficiary's Full Name and Address**

Re: Notice of right to withdraw funds

Dear **Beneficiary,**

This letter is to notify you that on **date**, a gift in the amount of **amount** was made to the **Trust Name** of which you are a beneficiary.

Under the terms of the trust, you have the right to withdraw a portion or all of this gift. Your withdrawal right will lapse after **the time period contained in the trust, i.e., 30 days** from the date of this notice. If you do not exercise your withdrawal right within this period, the gift will remain in trust and will be managed and distributed in accordance with the trust's terms.

To exercise your right to withdraw, please contact **Trustee's name** at **contact information** no later than **the exact date the gift lapses**.

This notice is provided as a requirement under the trust agreement and tax regulations. It is not intended to encourage or discourage you from withdrawing the funds. If you have questions or need further clarification, please consult your personal attorney or advisor.

Sincerely,

Trustee, Full Name, Address, Phone Number and Email Address

Beneficiary's Signature Acknowledgement

Date

Important Disclosures