

**Date:** [Current Date]

**To:**

[Financial Institution Name]

[Estate/Account Department Address]

[City, State, Zip Code]

**Re: Formal Request to Close Investment Account**

**Deceased Name:** [Full Name of Deceased]

**Account Number:** [Account Number]

**Date of Death:** [Date]

Dear Account Manager,

I am writing to formally notify you of the passing of the account holder mentioned above. I am the [Your Relationship, e.g., Executor/Administrator/Next of Kin] for the estate.

Please close the aforementioned investment account and provide instructions regarding the liquidation or transfer of the remaining assets. I have attached the following documents to facilitate this request:

- A certified copy of the Death Certificate.
- Letters Testamentary or Letters of Administration (appointing me as Executor).
- A copy of my government-issued identification.

Please inform me of any additional forms or steps required to finalize this process. If there are any outstanding checks or tax documents, please mail them to the address provided below.

Thank you for your assistance during this time.

Sincerely,

[Your Signature]

[Your Printed Name]

[Your Mailing Address]

[Your Phone Number]

[Your Email Address]