

[Your Full Name]  
[Your Address]  
[City, State, Zip Code]  
[Your Phone Number]  
[Date]

[Bank/Financial Institution Name]  
[Department Name]  
[Address]  
[City, State, Zip Code]

**RE: Notice to Finalize Estate and Close Fiduciary Account**

**Estate of:** [Full Name of Deceased]  
**Account Number:** [Fiduciary/Estate Account Number]  
**Tax ID/EIN:** [Estate Employer Identification Number]

To Whom It May Concern,

I am writing to you in my capacity as the court-appointed [Executor/Administrator/Personal Representative] of the Estate of [Name of Deceased]. As the administration of this estate has reached its conclusion, I am formally requesting the closure of the above-referenced fiduciary account.

Please find the following instructions for the final distribution of the remaining funds in the amount of \$[Amount]:

- Issue a final check payable to: [Name of Recipient or Law Firm Trust Account]
- Mail the final check to: [Mailing Address for Final Check]
- Provide a final statement showing a zero balance for estate record-keeping purposes.

Enclosed with this letter are copies of the [Letters Testamentary / Letters of Administration] and my government-issued identification, should you require updated verification of my authority to close this account.

Please confirm in writing once the account has been officially closed and the funds have been disbursed. If there are any additional forms required by your institution to complete this process, please contact me immediately at [Phone Number] or [Email Address].

Thank you for your assistance in this matter.

Sincerely,

[Signature]  
[Your Printed Name]  
[Executor/Administrator] for the Estate of [Name of Deceased]