

[Your Name]  
[Your Address]  
[Your Phone Number]  
[Your Email Address]

[Date]

[Financial Institution Name]  
[Department Name, e.g., Beneficiary Services]  
[Institution Address]

**RE: Request to Close Inherited IRA and Direct Rollover of Funds**

**Deceased Account Holder Name:** [Name of Deceased]  
**Deceased Account Number:** [Account Number]  
**Inherited/Beneficiary Account Number (if already established):** [Account Number]

To Whom It May Concern,

I am writing as the designated beneficiary of the above-referenced Individual Retirement Account. Please accept this letter as my formal instruction to close the inherited account and distribute the entire balance as a direct rollover.

Please liquidate all assets in the account and issue a check or electronic transfer for the total remaining balance to the following successor institution:

**Successor Institution Name:** [New Bank/Firm Name]  
**For the Benefit Of (FBO):** [Your Name] (Inherited IRA)  
**New Account Number:** [New Account Number]  
**Mailing Address for Check (if applicable):** [New Institution Address]

I understand that this is a direct fiduciary-to-fiduciary transfer and should not be treated as a taxable distribution to me personally. Please provide a final account statement reflecting the closure of the account for my records.

Enclosed with this letter, please find the following required documents:

- Certified Copy of the Death Certificate
- Copy of my Government-Issued Photo ID
- [Any additional forms required by the institution]

If you have any questions or require further information, please contact me at the phone number listed above.

Sincerely,

[Your Signature]

[Your Printed Name]