

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

[Financial Institution Name]  
[Attn: Retirement Accounts Department]  
[Institution Address]  
[City, State, Zip Code]

RE: Request to Close Account and Distribute Funds  
Account Number: [Your Account Number]  
Account Type: [e.g., Traditional IRA / Roth IRA]

To Whom It May Concern,

Please accept this letter as formal authorization to close the above-referenced Individual Retirement Account (IRA) and distribute the full balance to me via an indirect rollover.

I request that you liquidate all assets within this account and issue a check for the total remaining balance, minus any applicable fees or required tax withholdings, payable directly to me at the address listed above.

I understand that I am responsible for depositing these funds into another qualified retirement account within the 60-day IRS rollover window to avoid potential taxes and penalties.

If there are any forms required to finalize this request, or if you have any questions, please contact me at [Your Phone Number].

Thank you for your prompt assistance with this matter.

Sincerely,

[Your Signature]

[Your Printed Name]