

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

[Date]

[Name of Financial Institution/Company]
[Department Name, e.g., Estate Department]
[Company Address]

RE: Estate of [Deceased Person's Full Name]
Account Number(s): [List Account Numbers if known]

To Whom It May Concern,

I am writing to formally notify you of the passing of [Deceased Person's Name] on [Date of Death]. I am contacting you in my capacity as the [Your Relationship, e.g., Executor, Administrator, or Next of Kin] for the estate.

To settle the affairs of the deceased, I request that you provide a list of the documents required to close the account(s) or transfer the assets. Additionally, please provide the following information:

- The current balance of all accounts held in the deceased's name.
- A list of any outstanding debts or loans.
- The date of death valuation for tax purposes.
- Information regarding any named beneficiaries on the account.

Attached to this letter, please find a certified copy of the Death Certificate and [mention other documents, e.g., Letters Testamentary or Letters of Administration] confirming my authority to act on behalf of the estate.

Please let me know if there are specific forms I need to complete or if further documentation is required. I look forward to hearing from you at your earliest convenience.

Sincerely,

[Your Signature]

[Your Printed Name]