

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

[Date]

[Financial Institution Name]
[Department, e.g., Deceased Account Department]
[Institution Address]

RE: Notice of Death and Formal Request for Account Information

Deceased Account Holder: [Full Name of Deceased]
Account Number(s): [Account Number(s) if known]
Date of Birth: [DOB of Deceased]
Social Security Number: [SSN of Deceased]

To Whom It May Concern,

I am writing to formally notify you of the passing of [Full Name of Deceased] on [Date of Death].

I have been appointed as the [Executor / Administrator / Personal Representative] of the estate. I have enclosed a certified copy of the death certificate and the [Letters Testamentary / Letters of Administration] confirming my legal authority to act on behalf of the estate.

Please perform the following actions regarding the accounts listed above:

- Secure and freeze all accounts to prevent further unauthorized transactions.
- Provide a date-of-death balance statement for each account.
- List any outstanding checks, automatic debits, or recurring payments.
- Provide instructions and necessary forms required to transfer or close these accounts.

Please direct all future correspondence regarding this matter to my address listed above. Thank you for your assistance during this time.

Sincerely,

[Your Signature]

[Your Printed Name]
Representative of the Estate of [Name of Deceased]

Enclosures: [List enclosed documents, e.g., Death Certificate, Letters Testamentary]