

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

[Financial Institution Name]
[Department, e.g., Estates Department]
[Institution Address]

RE: Notification of Death and Formal Notice of Executorship

Deceased Account Holder: [Full Name of Deceased]
Date of Birth: [Date of Birth]
Date of Death: [Date of Death]
Social Security Number (if applicable): [SSN]
Account Number(s): [List Account Numbers]

To Whom It May Concern,

Please be advised that the above-named individual passed away on [Date of Death]. I am writing to you in my capacity as the Executor/Personal Representative of the estate.

Enclosed with this letter, please find the following documents:

- A certified copy of the Death Certificate.
- A copy of the Letters Testamentary (or Letters of Administration) confirming my authority to act on behalf of the estate.
- A copy of my government-issued photo identification.

I request that you immediately freeze the accounts listed above to prevent any further automated withdrawals or unauthorized access. Furthermore, please provide a formal "Date of Death" balance statement for each account, including any accrued interest or outstanding liabilities.

Please provide instructions regarding the necessary steps to close these accounts or transfer the remaining funds to the formal Estate Account. Please direct all future correspondence regarding these accounts to my address listed above.

Thank you for your prompt attention to this matter.

Sincerely,

[Your Signature]
[Your Printed Name]
Executor for the Estate of [Deceased's Name]