

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

[Bank Name]
[Department Name, e.g., Unclaimed Property/Deceased Estates]
[Bank Address]

RE: Claim for Dormant Account / Beneficiary Assets

To Whom It May Concern,

I am writing to formally submit a claim for the assets held in the following dormant account(s):

Account Holder Name: [Full Name of Deceased/Original Owner]
Account Number(s): [List Account Number(s) if known]
Social Security Number / Tax ID: [Last 4 digits or full number]
Date of Birth: [Date]

I am claiming these funds in my capacity as the [Legal Relationship, e.g., Named Beneficiary, Executor of Estate, or Next of Kin].

Enclosed with this letter, please find the following supporting documentation:

- Certified copy of the Death Certificate
- Copy of my government-issued photo identification
- [Optional: Letters of Testamentary or Small Estate Affidavit]
- [Optional: Proof of address]

Please review these documents and advise on the next steps required to facilitate the transfer or release of the funds. If there are specific claim forms required by your institution, please send them to the address listed above or via email.

Thank you for your assistance in this matter. I look forward to your prompt response.

Sincerely,

[Your Signature]

[Your Printed Name]