

Date: [Current Date]

To: [Financial Institution Name]

Address: [Bank Address]

City, State, Zip: [City, State, Zip]

Subject: Request for Required Documentation Regarding Deceased Depositor

Dear Estate Department,

I am writing to notify you of the passing of [Name of Deceased], who held accounts with your institution. I am the [Your Relationship to Deceased, e.g., Executor, Next of Kin] and am currently managing the affairs of the estate.

The details for the deceased are as follows:

- Full Name: [Full Name of Deceased]
- Date of Death: [Date]
- Account Number(s): [Account Number(s) if known]
- Social Security Number: [Last 4 Digits]

Please provide a comprehensive list of all documentation and forms required by your institution to settle or transfer these accounts. Specifically, please clarify if you require:

- A certified copy of the Death Certificate.
- Letters Testamentary or Letters of Administration.
- Small Estate Affidavits (if applicable).
- Completed internal bank claim forms.
- Tax identification numbers for the estate.

Please send the necessary information and any required forms to the following address:

[Your Name]

[Your Mailing Address]

[Your Phone Number]

[Your Email Address]

Thank you for your assistance during this time. I look forward to your prompt response.

Sincerely,

[Your Signature]

[Your Printed Name]