

Date: [Date]

To: [Recipient Name/Financial Institution]

Subject: Retirement Account Drawdown Pre-Qualification Letter

To Whom It May Concern,

This letter serves to confirm that [Account Holder Name] has been pre-qualified for a structured drawdown from their retirement account(s) maintained at [Financial Institution Name].

Account Details:

- **Account Type:** [e.g., 401(k), IRA, Roth IRA]
- **Account Number (Partial):** [Last 4 Digits]
- **Current Vested Balance:** \$[Amount]

Drawdown Qualification Status:

Based on our preliminary review of the account holder's age, tax status, and plan provisions, the account holder is eligible to receive distributions under the following terms:

- **Qualified Distribution Amount:** \$[Amount]
- **Frequency:** [e.g., Monthly, Quarterly, One-time]
- **Effective Start Date:** [Date]

This pre-qualification is based on current account values and governing regulations. Final approval is subject to the formal submission of distribution forms and verification of identity.

For further verification or questions regarding this account, please contact [Contact Name] at [Phone Number] or [Email Address].

Sincerely,

[Signature]

[Printed Name]

[Title/Role]

[Financial Institution/Company Name]