

[Date]

[Financial Institution Name]

[Address Line 1]

[City, State, Zip Code]

RE: Retirement Account Verification of Deposit

To Whom It May Concern,

Please accept this letter as formal verification of the retirement account(s) held by the individual named below at [Financial Institution Name].

Account Holder Information:

Name: [Account Holder Name]

Social Security Number (Last 4 digits): [XXX-XX-XXXX]

Account Number: [Account Number]

Account Details:

Account Type: [e.g., 401(k), IRA, Roth IRA]

Account Status: [e.g., Active/Open]

Date Opened: [Date]

Current Vested Balance: \$[Amount]

Current Market Value: \$[Amount]

Withdrawal Policy:

Are funds available for withdrawal prior to retirement? [Yes/No]

If yes, are there penalties or restrictions? [Details]

This information is provided per the request of the account holder for the purpose of [e.g., Mortgage Qualification / Asset Verification].

If you require any further information, please contact our office at [Phone Number].

Sincerely,

[Signature]

[Name of Bank Representative]

[Title]

[Financial Institution Name]