

Date: [Current Date]

[Financial Institution Name]

[Account Department]

[Address]

[City, State, Zip Code]

RE: Retirement Account Asset Verification

To Whom It May Concern,

This letter is to formally verify the retirement assets held by [Account Holder Name] at [Financial Institution Name].

Our records confirm the following account details as of [Date]:

- **Account Holder:** [Account Holder Name]
- **Account Number:** [Last 4 Digits of Account Number]
- **Account Type:** [e.g., 401(k), IRA, Roth IRA]
- **Current Vested Balance:** \$[Amount]
- **Account Status:** [e.g., Active/Open]
- **Date Account Opened:** [Date]

If you require any additional information or further documentation regarding this account, please contact our customer service department at [Phone Number].

Sincerely,

[Signature]

[Printed Name]

[Title/Position]

[Financial Institution Name]