

Date: [Date]

To: [Lender Name/Financial Institution]

Address: [Lender Address]

Loan Number: [Loan Number, if applicable]

RE: Verification of Assets for [Borrower Name(s)]

To Whom It May Concern,

This letter serves to verify the investment portfolio details for our client, [Borrower Name], held at [Brokerage/Firm Name]. This information is provided to assist in the verification of funds for a "Cash to Close" requirement regarding a real estate transaction.

As of [Date], the following account details are confirmed:

- **Account Number:** [Last 4 Digits of Account Number]
- **Account Type:** [e.g., Brokerage, IRA, 401k]
- **Current Market Value:** \$[Total Portfolio Value]
- **Available Liquidity:** \$[Amount available for withdrawal/liquidation]

We confirm that these assets are held in marketable securities, including [stocks, bonds, mutual funds, or cash equivalents]. These funds are currently available for liquidation and withdrawal, subject to standard settlement periods (typically T+2), to meet the necessary closing costs.

There are currently no outstanding liens, margin loans, or restrictions against this account that would prevent the withdrawal of the funds mentioned above.

If you require further documentation or have any questions, please contact me directly at [Phone Number] or [Email Address].

Sincerely,

[Signature]

[Name of Financial Advisor/Authorized Representative]

[Title]

[Financial Institution Name]