

Instruction: This is a model letter. Adapt to fit your facts and circumstances.

D A T E

N A M E
C O M P A N Y
A D D R E S S L I N E
C I T Y, S T A T E Z I P C O D E

Re: The Estate of

Dear Sirs:

My firm has been retained by _____, Administrator of the Estate of _____, to determine the assets and liabilities of the decedent's estate. _____ died intestate on _____, and subsequently was appointed Administrator. A copy of the Letters of Administration is attached.

Please provide me with a list of all bank account statements, certificates of deposit, promissory notes or other legal obligations that the decedent had or was listed on at your institution during the period of _____, through _____. Additionally, if the decedent had a safe deposit box located at one of your branches, please note that as well. The Administrator has reason to believe that the decedent had at least the following accounts at _____:

<u>ACCOUNT NUMBER</u>	<u>TYPE</u>
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If possible I would like to know the date each account was opened/closed and the approximate cost of obtaining copies of all statements, etc.

If you should have any questions, please contact me at the phone number above. Your assistance with this matter is greatly appreciated.

Sincerely,

BY:

/
Attachments

cc:
bcc: