

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

DATE

Name
Address Line 1
Address Line 2
City, State Zip Code

Re: Account No.
Name
Address Line 1
Address Line 2
City, State Zip Code

Dear Name:

This letter will serve as authorization to release the funds being held in the above referenced account. A certified copy of the Letters Testamentary, IRA statement of account and Death Certificate were previously provided to you and are being held in your file according to your previous correspondence. Please make the proceed check payable to the Estate of Name and remit to the address below.

If you have any questions, or need additional information, please contact Name, attorney for the estate.

Sincerely,

Name, Executrix

ATTEST: