

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

<date>

Name of Company

Address

Address

Re: Account No. _____

Dear _____ :

This letter is written on behalf of _____, Executrix of the Estate of _____. _____ departed this life on _____, 20_____ and I have enclosed an original Death Certificate and Letters Testamentary certified by the Clerk for your file. Also enclosed is a copy of an IRA statement of account showing that _____ had funds in the referenced account at the time of his death. Please release the funds and make the proceed check payable to the Estate of _____. _____ never married and was not married at the time of his death.

If you have any questions or need additional information, please do not hesitate to contact me.

Sincerely,

Enclosures