

Financial Disclosure for Retirement Accounts

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient's Name]

[Recipient's Title]

[Company/Organization Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I am writing to disclose my financial information related to my retirement accounts as requested.

Below are the details of my accounts:

Retirement Accounts

Account Type	Institution	Account Number	Current Value
401(k)	[Institution Name]	[Account Number]	[\$Value]
IRA	[Institution Name]	[Account Number]	[\$Value]
Roth IRA	[Institution Name]	[Account Number]	[\$Value]

Please let me know if you require any additional information regarding these accounts. I appreciate your attention to this matter.

Sincerely,

[Your Signature (if sending a hard copy)]

[Your Printed Name]