

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Date]

[Retirement Plan Administrator's Name]

[Company/Institution Name]

[Company Address]

[City, State, Zip Code]

Subject: Request for Retirement Benefits Account Information

Dear [Retirement Plan Administrator's Name],

I hope this letter finds you well. I am writing to formally request information regarding my retirement benefits account, which is held under the name [Your Name] and account number [Your Account Number].

As I am considering my retirement options, I would greatly appreciate your assistance in providing the following information:

- Current balance of my retirement benefits account
- Details about my vested benefits
- Information regarding any withdrawal options available to me
- Any applicable fees or penalties for early withdrawal

Please let me know if you require any further information or documentation from my side to process this request. I appreciate your attention to this matter and look forward to your prompt response.

Thank you for your assistance.

Sincerely,

[Your Name]