

[Your Name]

[Your Address]

[City, State, ZIP Code]

[Email Address]

[Phone Number]

[Date]

[Recipient Name]

[Recipient Title]

[Company/Organization Name]

[Company Address]

[City, State, ZIP Code]

Dear [Recipient Name],

I am writing to formally request a statement of the funds associated with my beneficiary account, under the account number [Account Number]. I would appreciate it if you could provide a detailed statement of transactions, current balance, and any accrued interest.

Please send this information to my address indicated above or via email at [Your Email Address]. I look forward to your prompt response to this request.

Thank you for your attention to this matter.

Sincerely,

[Your Name]