

Beneficiary Estate Plan Access Request

Date: [Insert Date]

[Your Name]
[Your Address]
[City, State, Zip Code]
[Email Address]
[Phone Number]

[Executor's Name]
[Executor's Address]
[City, State, Zip Code]

Dear [Executor's Name],

I hope this message finds you well. I am writing to formally request access to the estate plan of [Deceased's Name] concerning the allocation of assets as part of the estate settlement process.

As a beneficiary, I believe it is important to understand the details surrounding the distribution of assets in order to ensure proper communication and cooperation among all parties involved.

Specifically, I would like to request the following information:

- A detailed list of all assets included in the estate.
- The allocation plan for these assets among the beneficiaries.
- Any relevant timelines or deadlines for the distribution process.

Please let me know if there are any forms or procedures I need to complete to facilitate this request. I appreciate your prompt attention to this matter and look forward to your response.

Thank you for your cooperation.

Sincerely,

[Your Name]
[Your Relation to the Deceased]