

# Request for Access to Estate Plan

Date: [Insert Date]

[Recipient's Name]

[Recipient's Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I hope this message finds you well. I am writing to formally request access to the estate plan documents pertaining to the estate of [Deceased's Name], from which I am a beneficiary. As a beneficiary, I believe it is in my right to review the financial details and arrangements made in the estate plan.

To facilitate the financial review, please provide the following documents:

- Last Will and Testament
- Trust Documents
- Financial Statements
- List of Assets and Liabilities

If there are specific procedures or forms required to process this request, please inform me at your earliest convenience. I appreciate your assistance in this matter and look forward to your prompt response.

Thank you for your attention to this important request.

Sincerely,

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email]

[Your Phone Number]