

Beneficiary Estate Plan Access Request

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient's Name]

[Recipient's Title/Position]

[Company/Organization Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I hope this letter finds you well. I am writing to formally request access to the estate plan of [Deceased's Name], who passed away on [Date of Death]. As a named beneficiary, I am seeking information regarding the estate plan specifically related to tax implications that may affect my share.

Please provide me with the relevant documents or details regarding the estate plan, including any tax-related information that may be pertinent to my situation. I understand that this may require some time and I appreciate your assistance in this matter.

Thank you for your attention to my request. I look forward to your prompt response.

Sincerely,

[Your Name]