

# Beneficiary Retirement Account Statement

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Recipient Name]

[Recipient Title]

[Company Name]

[Company Address]

[City, State, Zip Code]

## Subject: Compliance Verification of Retirement Account

Dear [Recipient Name],

I am writing to provide a statement of the retirement account held in the name of [Beneficiary Name] as part of the compliance verification process. Below are the details of the account:

Account Name	Account Number	Balance	Account Type	Date Opened
[Beneficiary Name]	[Account Number]	[Account Balance]	[Account Type]	[Date Opened]

Should you require any further documentation or information, please do not hesitate to contact me at [Your Phone Number] or [Your Email Address].

Thank you for your attention to this matter.

Sincerely,

[Your Name]

[Your Title]

[Your Company]