

# Retirement Account Statement

Date: [Insert Date]

To: [Insert Beneficiary Name]

[Insert Beneficiary Address]

[Insert City, State, Zip Code]

Re: Retirement Account Statement for Estate Settlement

Dear [Insert Beneficiary Name],

We are writing to provide you with the retirement account statement for the estate of [Insert Deceased's Name], who passed away on [Insert Date of Death]. As the designated beneficiary of the account, it is important for you to have the following information for the settlement process.

## Account Information

Account Holder: [Insert Deceased's Name]

Account Number: [Insert Account Number]

Institution: [Insert Financial Institution Name]

Current Balance: [Insert Balance Amount]

## Transaction History

- [Date] - [Transaction Description] - [Amount]
- [Date] - [Transaction Description] - [Amount]
- [Date] - [Transaction Description] - [Amount]

Please keep this statement for your records and for the estate settlement process. If you have any questions or require further information, do not hesitate to reach out to us at [Insert Contact Information].

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Your Contact Information]