

Beneficiary Retirement Account Statement

Date: [Insert Date]

To: [Recipient's Name]

[Recipient's Address]

Subject: Beneficiary Retirement Account Statement

Dear [Recipient's Name],

We are writing to provide you with your latest account statement for your retirement beneficiary account.

Account Information

Account Holder: [Account Holder's Name]

Account Number: [Account Number]

Statement Period: [Start Date] to [End Date]

Account Summary

Starting Balance: \$[Starting Balance]

Contributions: \$[Total Contributions]

Withdrawals: \$[Total Withdrawals]

Ending Balance: \$[Ending Balance]

Investment Performance

Investment Options:

- [Investment Option 1]: \$[Value]
- [Investment Option 2]: \$[Value]
- [Investment Option 3]: \$[Value]

If you have any questions or need further clarification, please do not hesitate to contact us.

Thank you for allowing us to assist you with your financial planning.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Your Contact Information]