

Beneficiary Retirement Account Statement

Date: [Insert Date]

To: [Recipient Name]

[Recipient Address]

[City, State, Zip Code]

Dear [Recipient Name],

This letter serves as an official statement regarding the retirement account of the late [Deceased's Name], account number [Account Number]. As the designated beneficiary, you are entitled to a portion of the benefits associated with this account.

Details of the retirement account are as follows:

- Account Holder: [Deceased's Name]
- Account Type: [e.g., 401(k), IRA]
- Date of Decease: [Date]
- Current Account Balance: [Amount]
- Beneficiary Percentage: [Your Percentage]

Please review the enclosed documents for further information regarding the distribution process and your rights as a beneficiary. Should you have any questions or require additional clarification, feel free to contact us at [Contact Information].

We appreciate your understanding during this difficult time and wish to ensure that the process is as smooth as possible.

Sincerely,

[Your Name]

[Your Position]

[Company Name]

[Company Address]

[City, State, Zip Code]

[Your Contact Information]