

# Beneficiary Retirement Account Statement

Date: [Insert Date]

To: [Beneficiary's Name]

[Beneficiary's Address]

[City, State, Zip Code]

Dear [Beneficiary's Name],

We are writing to provide you with the statement for your retirement account for tax preparation purposes. Please find below the details of your account as of [Insert Statement Date].

## Account Information

Account Holder: [Deceased Account Holder's Name]

Account Number: [Insert Account Number]

## Account Balance

Total Balance as of [Insert Statement Date]: \$[Insert Total Balance]

## Withdrawal Information

Amount Withdrawn: \$[Insert Amount], Date of Withdrawal: [Insert Date]

## Interest Earned

Interest Earned for the Year: \$[Insert Amount]

## Tax Information

Tax Year: [Insert Year]

1099-R Form: [Include if applicable]

Please retain this statement for your records and for use in your tax preparation. If you have any questions, feel free to contact us at [Insert Contact Information].

Thank you,

Sincerely,

[Your Company's Name]

[Your Company's Address]

[City, State, Zip Code]

[Contact Number]

[Email Address]