

# Withdrawal Request for Beneficiary Retirement Account

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Financial Institution Name]

[Institution Address]

[City, State, Zip Code]

Dear [Financial Institution Representative's Name],

I am writing to formally request a withdrawal from my beneficiary retirement account associated with [Account Holder's Name], who passed away on [Date of Passing]. My relationship to the account holder is [Your Relationship].

Account Number: [Insert Account Number]

Amount Requested: [Insert Amount]

Please find enclosed the required documents for verification:

- Proof of Death (Death Certificate)
- Your Identification (Copy of Driver's License or Passport)
- Any other necessary documents as per your institution's requirements

I appreciate your attention to this matter and look forward to your prompt response regarding the processing of this withdrawal request. Should you require any additional information, please do not hesitate to contact me at the phone number or email provided above.

Thank you for your assistance.

Sincerely,

[Your Signature (if sending a hard copy)]

[Your Printed Name]