

# Comprehensive Estate Asset Audit

Date: [Insert Date]

To: [Recipient's Name]

[Recipient's Address]

[City, State, Zip Code]

Dear [Recipient's Name],

As part of our ongoing commitment to ensuring the accuracy and completeness of your estate planning, we are conducting a comprehensive asset audit. This process will help us identify all assets and liabilities that you own, ensuring they are appropriately managed and distributed according to your wishes.

## Scope of the Audit

The audit will cover the following:

- Real Estate Properties
- Bank Accounts
- Investment Accounts
- Insurance Policies
- Retirement Accounts
- Personal Property
- Business Interests

## Required Documentation

Please provide us with the following documents by [Insert Due Date]:

- Titles and Deeds for Real Estate
- Last Bank Statements
- Investment Account Statements
- Insurance Policy Documents
- Retirement Account Information
- List of Personal Belongings of Value
- Business Documents (if applicable)

We appreciate your cooperation in this important matter. Should you have any questions or require assistance in gathering these documents, please do not hesitate to reach out to us at [Insert Contact Information].

Thank you for your attention to this matter. We look forward to your prompt response.

Sincerely,

[Your Name]

[Your Position]

[Your Company]

[Your Contact Information]