

# Estate Plan Asset Evaluation Request

Date: [Insert Date]

[Recipient's Name]

[Recipient's Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I hope this letter finds you well. I am writing to formally request an evaluation of the assets included in my estate plan. As part of my ongoing financial planning and to ensure that my estate plan is comprehensive, it is essential to have an accurate understanding of the current value of my assets.

Please provide an evaluation of the following assets:

- Real Estate: [Property Addresses]
- Investments: [List of Investments]
- Bank Accounts: [List of Bank Accounts]
- Business Interests: [Details]
- Personal Property: [Items of Value]

Additionally, if there are any documents or information needed from my side to facilitate this evaluation, please let me know at your earliest convenience.

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

Sincerely,

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Phone Number]

[Your Email Address]