

Investment Account Tax Statement Request

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient Name]

[Recipient Title]

[Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient Name],

I am writing to formally request the tax statement for the investment accounts held under the estate of [Deceased's Name], who passed away on [Date of Death]. As the executor/trustee of the estate, it is imperative that I obtain this information to facilitate the proper filing of tax returns.

Please provide the following information:

- Account Statements for the tax year [Year]
- Transaction History for the tax year [Year]
- Any 1099 forms issued for this account for the tax year [Year]

Should you require any further documentation or information, please do not hesitate to contact me at [Your Phone Number] or [Your Email Address]. I appreciate your prompt attention to this matter and look forward to your swift response.

Thank you for your assistance.

Sincerely,

[Your Name]

[Your Title, if applicable]

[Your Relationship to Deceased, if applicable]