

Retirement Plan Withdrawal Request

Date: [Insert Date]

To: [Insert Recipient's Name]

[Insert Recipient's Title]

[Insert Company/Organization Name]

[Insert Company Address]

Dear [Recipient's Name],

I hope this message finds you well. I am writing to formally request a withdrawal from my retirement plan with [Insert Retirement Plan Provider Name]. My account number is [Insert Account Number].

As I approach retirement, I would like to initiate the withdrawal process due to [briefly state reason, e.g., "personal financial needs" or "relocation"]. Please provide me with the necessary forms and any information required to facilitate this request.

Additionally, I would appreciate if you could outline any potential tax implications and the timeline I should expect for the withdrawal process.

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

Sincerely,

[Your Name]

[Your Address]

[Your Phone Number]

[Your Email Address]