

# Request for Tax-Deferred Investment Fund Withdrawal

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email]

[Your Phone Number]

[Recipient Name]

[Recipient Title]

[Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient Name],

I am writing to formally request a withdrawal from my tax-deferred investment fund account, [Account Number], in accordance with the regulations governing such withdrawals. I would like to initiate this process as I am in need of the funds for [brief reason, e.g., personal use, medical expenses, etc.].

Please find attached the necessary documentation to support my request, including [list any documents you are enclosing, e.g., identification, withdrawal form, etc.]. I understand that there may be tax implications associated with this withdrawal and I am prepared to comply with any requirements on your part to facilitate this transaction.

Please confirm the receipt of this request and let me know the steps I should follow to complete the withdrawal process. I appreciate your prompt attention to this matter.

Thank you for your assistance.

Sincerely,

[Your Signature (if sending a hard copy)]

[Your Printed Name]