

# Retirement Funds Transfer Request

Your Name: [Your Name]

Your Address: [Your Address]

City, State, Zip: [City, State, Zip]

Email: [Your Email]

Phone Number: [Your Phone Number]

Date: [Date]

To: [Retirement Plan Administrator's Name]

[Retirement Plan Administrator's Contact Information]

Subject: Request for Transfer of Retirement Funds

Dear [Retirement Plan Administrator's Name],

I am writing to formally request the transfer of my retirement funds held within the [Current Plan Name] to my new retirement account with [New Plan Name]. My account number with your institution is [Current Account Number].

As I am transitioning to a new retirement plan, I would appreciate your assistance in initiating this transfer as soon as possible. Please find my new account details below:

New Plan Name: [New Plan Name]

New Account Number: [New Account Number]

Institution Name: [Institution Name]

Institution Address: [Institution Address]

Please let me know if you require any further information or documentation to process this request. I appreciate your prompt attention to this matter.

Thank you for your assistance.

Sincerely,  
[Your Name]