

Retirement Account Rollover Notification

Date: [Insert Date]

To: [Recipient's Name]

[Recipient's Address]

[City, State, Zip Code]

Dear [Recipient's Name],

We are writing to notify you of your recent request to roll over your retirement account from [Current Financial Institution] to [New Financial Institution].

Details of your rollover are as follows:

- Account Holder: [Your Name]
- Account Number: [Your Account Number]
- Amount to be Rolled Over: [Amount]
- Effective Date of Rollover: [Effective Date]

Please ensure that all relevant forms are completed and submitted as per the guidelines provided by both financial institutions. If you have any questions or require assistance, do not hesitate to contact us at [Contact Number] or [Email Address].

Thank you for your attention to this matter.

Sincerely,

[Your Name]

[Your Title]

[Your Company Name]

[Your Contact Information]