

Retirement Plan Fund Transfer Request

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Date]

[Recipient Name]

[Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient Name],

I am writing to formally request the transfer of my retirement plan funds from [Current Plan Provider] to [New Plan Provider]. Below are the details of my account:

Account Holder Name: [Your Name]

Account Number: [Your Account Number]

Plan Type: [Plan Type]

For your reference, please find attached any necessary documentation to facilitate the transfer. I would appreciate your prompt attention to this matter, and I look forward to receiving confirmation of the transfer.

Thank you for your cooperation.

Sincerely,

[Your Name]