

Rollover Instructions for Retirement Account

Date: [Insert Date]

[Recipient's Name]

[Recipient's Address]

[City, State, Zip]

Dear [Recipient's Name],

Subject: Rollover Instructions for Your Retirement Account

This letter is to provide you with detailed instructions for rolling over your retirement account from [Current Financial Institution] to [New Financial Institution]. Please follow the steps outlined below to ensure a smooth transfer of your funds:

1. Contact [Current Financial Institution] to request a rollover of your retirement account.
2. Complete the necessary forms as provided by [Current Financial Institution].
3. Provide them with the details of your new account at [New Financial Institution].
4. Request that the funds be transferred as a direct rollover to avoid tax implications.

Please note that it is important to complete this rollover within 60 days to avoid any potential tax liabilities. If you have any questions or need assistance with the process, feel free to reach out to me directly at [Your Phone Number] or [Your Email Address].

Thank you for your attention to this matter. We appreciate your prompt action concerning your retirement account.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Your Contact Information]