

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Date]

[Retirement Plan Administrator's Name]

[Retirement Plan Company]

[Company Address]

[City, State, Zip Code]

Subject: Request for Transfer of Retirement Funds

Dear [Retirement Plan Administrator's Name],

I hope this letter finds you well. I am writing to formally request the transfer of my retirement funds from [Current Retirement Plan Name or Account Number] to [New Retirement Plan Name or Account Number], in accordance with the provisions of the retirement plan.

As I plan for my retirement, it is crucial for me to consolidate my retirement assets effectively. I believe that transferring my funds will provide me with better investment options and management services.

Please find attached any required forms and documentation needed to facilitate this transfer.

I appreciate your prompt attention to this matter and look forward to your confirmation of the transfer process. Should you require any additional information, please do not hesitate to contact me at the above phone number or email address.

Thank you for your assistance.

Sincerely,

[Your Signature (if sending a hard copy)]

[Your Printed Name]