

Inheritance Account Setup for Advanced Directives

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient's Name]

[Recipient's Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I hope this letter finds you well. I am writing to inform you of the setup of an inheritance account as part of my advanced directives. This account is established with the intent to manage and distribute my assets according to my wishes, as outlined in my will.

For the effective execution of these directives, please find the account details below:

- Account Name: [Insert Account Name]
- Account Number: [Insert Account Number]
- Bank Name: [Insert Bank Name]
- Beneficiary Information: [Insert Beneficiary Name & Details]

It is imperative that all assets be transferred to this account to ensure proper management in accordance with my directives. I would appreciate your assistance in facilitating this process.

Please feel free to reach out to me if you have any questions or require further information.

Thank you for your attention to this important matter.

Sincerely,

[Your Name]