

Inheritance Account Setup for Tax Purposes

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Date]

[Recipient Name]

[Recipient Title]

[Institution Name]

[Institution Address]

[City, State, Zip Code]

Re: Setup of Inheritance Account

Dear [Recipient Name],

I am writing to formally request the setup of an inheritance account in accordance with tax regulations following the passing of [Deceased's Name] on [Date of Passing]. I have been designated as the executor of the estate, and it is my responsibility to ensure that all financial affairs are managed appropriately.

Please find the necessary details below for the establishment of this account:

- **Deceased's Full Name:** [Deceased's Full Name]
- **Date of Birth:** [Deceased's Date of Birth]
- **Date of Passing:** [Deceased's Date of Passing]
- **Estate Tax Identification Number:** [EIN]
- **Your Relationship to Deceased:** [Your Relationship]

Additionally, I would like to inquire about any necessary documentation I need to provide, including but not limited to, the death certificate, will, and any relevant tax forms.

Thank you for your attention to this matter. I look forward to your prompt response so we can ensure compliance with all tax obligations associated with this inheritance.

Sincerely,

[Your Name]

[Your Position (if applicable)]