

[Attorney Name/Law Firm]

[Address Line 1]

[Address Line 2]

[Phone Number]

[Email Address]

[Date]

[Financial Institution Name]

[Legal Department/Compliance Department]

[Address Line 1]

[Address Line 2]

RE: NOTICE OF REPRESENTATION AND FORMAL DEMAND TO FREEZE ASSETS

Deceased: [Name of Decedent]

Account Number(s): [List Account Numbers if known, or "All accounts associated with SSN XXX-XX-XXXX"]

Case Number: [Court Case Number, if filed]

To Whom It May Concern:

Please be advised that this firm represents [Client Name] in connection with the Estate of [Name of Decedent]. Our client is a [Relationship, e.g., Heir/Beneficiary/Nominated Personal Representative] of the estate.

We are currently engaged in probate litigation regarding the validity of [the Will/Trust/Ownership Transfers] and the proper distribution of the assets held by your institution. Due to the pending dispute and the risk of unauthorized dissipation or transfer of funds, we hereby demand that **a temporary administrative freeze** be placed on all accounts held in the name of the Decedent or in which the Decedent held an interest at the time of death.

Until further notice from this firm or a formal Order from the [Name of Court] Court, your institution is requested to:

- Prevent any withdrawals, transfers, or disbursements from the aforementioned accounts;
- Revoke any existing Power of Attorney or signatory authority previously granted to third parties;
- Preserve all records, statements, and signature cards related to these accounts for discovery purposes.

Attached please find [List Attachments, e.g., Death Certificate, Preliminary Court Filings] for your records. Please provide written confirmation to our office within [Number] business days that the requested freeze has been implemented.

Thank you for your immediate attention to this matter.

Sincerely,

[Attorney Signature]

[Printed Name of Attorney]

[Law Firm Name]