

Date: [Current Date]

To: [Name of Transfer Agent]

[Address of Transfer Agent]

[City, State, Zip Code]

RE: Estate Settlement Transfer for [Deceased Shareholder's Full Name]

Account Number: [Account Number]

Social Security Number (Last 4 digits): [Last 4 Digits of SSN]

Dear Transfer Agent,

I am writing to you in my capacity as the [Executor/Administrator/Personal Representative] of the Estate of [Deceased Shareholder's Name], who passed away on [Date of Death].

I am requesting the transfer of the following securities held in the deceased's name:

Issuer Name: [Company Name]

Number of Shares: [Total Number of Shares]

Certificate Number(s) (if applicable): [List Certificate Numbers]

Please transfer these shares to the following beneficiary:

Name: [Beneficiary Name]

Address: [Beneficiary Address]

Social Security Number: [Beneficiary SSN]

Account Number (if existing): [Existing Account Number]

Enclosed please find the required documentation for this transfer:

- Certified Copy of the Death Certificate
- Certified Letters Testamentary or Letters of Administration
- Stock Power Form with Medallion Signature Guarantee
- Affidavit of Domicile
- W-9 Form for the Beneficiary

Please notify me once the transfer has been completed or if additional information is required. You may reach me at [Your Phone Number] or [Your Email Address].

Sincerely,

[Your Signature]

[Your Printed Name]

[Your Address]

[Your City, State, Zip Code]