[Your Name]
[Your Address]
[Your Phone Number]
[Your Email Address]

[Date]

[Financial Institution Name]
[Institution Address]
[City, State, Zip Code]

RE: Preliminary Letter of Instruction regarding the Estate of [Deceased Full Name]
Account Number(s): [List Account Numbers if known]
Date of Death: [Date]

To Whom It May Concern,

Please be advised that [Deceased Name] passed away on [Date]. I am writing to you in my capacity as the [Executor / Administrator / Next of Kin] for the estate.

The purpose of this letter is to formally notify you of the death and to request a "Date of Death" valuation for all accounts held by the deceased. This information is required for tax and probate purposes.

I have enclosed a certified copy of the Death Certificate for your records. Please also provide the following information:

- Current balance of all accounts as of the date of death.
- Details regarding any outstanding debts, loans, or liens.
- A list of designated beneficiaries currently on file.
- Required forms and instructions to begin the formal transfer or distribution of assets.

Please freeze any individual accounts held solely in the name of the deceased to prevent unauthorized transactions, while allowing any automatic deposits to continue until further notice.

Please confirm receipt of this notification and send the requested documentation to the address listed above. If you require additional documentation, such as Letters Testamentary or Letters of Administration, please let me know.

Thank you for your assistance in this matter.

Sincerely,

[Your Signature]

[Your Printed Name]