[Your Name/Executor Name]
[Your Address]
[City, State, Zip Code]
[Phone Number]
[Email Address]

[Date]

[Broker Name/Contact Person]
[Brokerage Firm Name]
[Firm Address]
[City, State, Zip Code]

RE: Transfer of Securities for the Estate of [Deceased Name]
Account Number: [Deceased's Account Number]

Dear [Broker Name or Customer Service Department],

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

Pursuant to the settlement of the estate, I hereby instruct you to transfer the securities held in the above-referenced account as follows:

Option A: Transfer to Estate Account
Please transfer all assets from the deceased's account into a new estate account opened under the name: [Estate Name] / TIN: [Estate Tax ID].

Option B: Transfer to Beneficiary
Please transfer [Number of Shares or "All Assets"] to the following recipient:
Beneficiary Name: [Name]
Beneficiary Brokerage Firm: [Firm Name]
Beneficiary Account Number: [Account Number]
DTC Number: [DTC Number if applicable]

Enclosed with this letter, please find the following required documentation:

- Certified Copy of the Death Certificate
- Certified Copy of the Letters Testamentary / Letters of Administration
- Affidavit of Domicile
- Stock Power Form (if applicable)
- [List any other required forms]

Please notify me once the transfer is complete or if further documentation is required to process this request. Thank you for your assistance in this matter.

Sincerely,

[Your Signature]

[Your Printed Name]
Executor for the Estate of [Deceased Name]