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

[Date]

[Broker Name]
[Financial Institution Name]
[Brokerage Address]

RE: Transfer of Securities Held in Joint Tenancy
Account Number: [Account Number]
Deceased Joint Tenant: [Name of Deceased]

Dear [Broker Name or Customer Service Department],

I am writing to formally notify you of the death of [Name of Deceased], who held the above-referenced account with me as a Joint Tenant with Right of Survivorship. [Name of Deceased] passed away on [Date of Death].

As the surviving joint tenant, I am instructing you to transfer all securities and cash balances held in this account into a new individual account in my name only, or to update the existing account to reflect my sole ownership.

Enclosed please find the following documents required for this transfer:

- A certified copy of the Death Certificate for [Name of Deceased].
- A completed and notarized Affidavit of Domicile.
- [List any other required forms, e.g., New Account Application].

Please notify me once the transfer is complete or if you require any additional information to process this request. Thank you for your prompt attention to this matter.

Sincerely,

[Your Signature]

[Your Printed Name]