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

[Date]

[Broker Name/Financial Advisor Name]
[Financial Institution Name]
[Department Name, if applicable]
[Address]
[City, State, Zip Code]

RE: Instruction for Transfer of Securities - Estate of [Deceased's Full Name]

Dear [Broker Name],

Pursuant to the Last Will and Testament of [Deceased's Name], who passed away on [Date of Death], I am writing in my capacity as the [Executor/Personal Representative] to instruct the transfer of securities currently held in the following account:

Account Holder Name: [Full Name on Account]
Account Number: [Account Number]

Please execute the transfer of the securities listed below as a testamentary bequest to the specified beneficiary:

Security Description: [e.g., Name of Stock/Mutual Fund]
Ticker Symbol/CUSIP: [Symbol]
Quantity: [Number of Shares or "All Shares"]

Beneficiary Information:
Name: [Beneficiary Full Name]
Address: [Beneficiary Address]
Tax Identification Number (SSN/EIN): [Social Security Number]
Receiving Brokerage Name: [Recipient Institution]
Receiving Account Number: [Recipient Account Number]
DTC Number: [DTC Number, if known]

Enclosed with this letter, please find the following required documentation:
1. Certified Copy of the Death Certificate
2. Letters Testamentary (issued by the Probate Court)
3. [Any other required forms, e.g., Affidavit of Domicile or Stock Power]

Please notify me once the transfer has been initiated or if further information is required to complete this transaction.

Sincerely,

[Signature]

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