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

[Date]

[Name of Records Custodian/Firm]
[Attn: Records Department]
[Address]
[City, State, Zip Code]

RE: Formal Request for Retrieval of Estate Planning Documents
Client Name: [Full Name of Deceased or Grantor]
Date of Birth: [DOB]
Last Four Digits of SSN: [Last 4 Digits]

To Whom It May Concern,

I am writing to you in my capacity as the [Executor / Personal Representative / Successor Trustee / Authorized Agent] regarding the estate of the above-named individual. I am formally requesting the retrieval and release of the original versions or certified copies of the following estate planning documents currently held in your custody:

- Last Will and Testament
- Codicils to the Will
- Revocable or Irrevocable Trust Agreements
- Trust Amendments
- Power of Attorney (Financial and Healthcare)
- Living Will / Advance Healthcare Directive
- [Other: Specify Document Name]

Enclosed with this letter, please find the following supporting documentation to verify my authority to receive these records:

- Copy of the Death Certificate (if applicable)
- Certified Letters Testamentary or Letters of Administration
- A copy of my government-issued photo identification

Please deliver these documents via [Secure Mail / Pickup / Electronic Transfer] to the following address: [Enter Delivery Address].

If there are any fees associated with the retrieval or duplication of these records, please notify me immediately so that payment can be arranged. If you do not possess these documents, please

provide any information regarding their last known location or if they were transferred to another firm.

Thank you for your prompt attention to this matter. Should you have any questions, please contact me at [Your Phone Number].

Sincerely,

[Your Signature]

[Your Printed Name]