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

[Date]

[Recipient Name or Institution Name]
[Recipient Address]
[City, State, Zip Code]

RE: Formal Letter of Instruction regarding the Estate of [Full Name of Deceased]

To Whom It May Concern,

I am writing to you in my capacity as the [Executor/Administrator/Personal Representative] of the Estate of [Full Name of Deceased], who passed away on [Date of Death]. I have enclosed a certified copy of the Death Certificate and my Letters of Testamentary (or Letters of Administration) for your records.

I am currently in the process of identifying and consolidating all assets belonging to the decedent. Please provide a comprehensive statement or written confirmation regarding any of the following held by your institution in the decedent's name:

- Current account balances (Checking, Savings, Money Market).
- Certificates of Deposit (CDs) and their maturity dates.
- Investment portfolios, stocks, or bonds.
- Safe deposit box numbers and location.
- Retirement accounts (IRA, 401k) and listed beneficiaries.
- Any outstanding debts, loans, or lines of credit.

If any accounts have already been closed, please provide the date of closure and the final balance at the time of closing.

Furthermore, please freeze all accounts to prevent unauthorized withdrawals or automated debits until further notice. I will provide specific instructions regarding the transfer or liquidation of these assets once the inventory is complete.

Please send the requested documentation to my address listed above. If you require any additional forms or information to process this request, please contact me immediately.

Thank you for your prompt assistance in this matter.

Sincerely,

[Signature]

[Your Printed Name]
Representative of the Estate of [Name of Deceased]

Enclosures:
1. Certified Copy of Death Certificate
2. Letters of Testamentary / Letters of Administration
3. Copy of Decedent's Identification (if available)