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

[Date]

[Recipient Name/Search Firm Name]
[Title]
[Company Name]
[Address]
[City, State, Zip Code]

RE: Letter of Instruction for Financial Account and Liquid Asset Search

To [Recipient Name or Claims Department],

I am writing to formally instruct and authorize a comprehensive search for financial accounts and liquid assets associated with the individual identified below:

Subject Information:
Full Name: [Full Name of Individual]
Date of Birth: [DOB]
Social Security Number: [SSN]
Last Known Address: [Full Address]

Scope of Search:
Please conduct a search for the following assets held in the subject's name, or where the subject has a beneficial interest:

- Checking and savings accounts
- Certificates of Deposit (CDs) and Money Market accounts
- Brokerage and investment accounts
- Safe deposit boxes
- Unclaimed property or dormant funds

Purpose of Request:
This request is being made for the purpose of [State reason: e.g., Estate Administration / Legal Discovery / Due Diligence].

Authorization:
Attached please find [List attachments: e.g., Death Certificate, Letters Testamentary, or Power of Attorney] as proof of my legal authority to request this information.

Please deliver the final report and any findings to my attention at the address listed above. If there are any fees associated with this search, please provide a written estimate for approval before proceeding.

Sincerely,

[Your Signature]

[Your Printed Name]