

AP name
AP address

Date of letter

Salutation of addressee

Re: Name of deceased

I am an executor for the estate of the above named, who died on Date of death. The estate appears to include the benefit of the annuity described below:

Name in which annuity held	Description of annuity	Annuity contract number	Date of annuity contract
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For the purpose of Inheritance Tax and Probate, would you kindly confirm:

1. The annuity amounts (if any) paid to the deceased in the current tax year, identifying the date, amount and method of each payment
2. The amount of any annuity payments due (but not yet paid) up to the date of death; or alternatively, the amount of any overpayment of annuity
3. If any capital sum is due to the estate under the annuity

Please advise if any other person or if the deceased's estate, following the death of the deceased, has an entitlement to benefit under the annuity and, if so, as to the nature of that entitlement.

I should also be grateful if you would search your records for any other assets that may have been held by the deceased with your company.

The deceased's last address was Last address.

When the grant of probate has been obtained, I shall send an official copy to you for your inspection. Please let me know what formalities (if any) will be involved in obtaining payment of any monies due to the estate.

I have enclosed a copy of the death certificate for your perusal and I would appreciate you returning this to me when you have completed your investigation.

Yours sincerely

ragnar jonasson