

Investment provider name

Date

Dear Sir/Madam

Re: Name of deceased

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

Name in which asset held	Description of asset	Asset reference	Date of asset
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For the purpose of Inheritance Tax and Probate, would you kindly confirm the value of the asset at the date of death, together with any accrued interest or other outstanding monies (e.g. dividends, bonuses) that might apply.

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, whether in their sole name or held jointly with another.

The deceased's last address was .

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 faithfully

Name