

Insert Date

**Bank/Financial Institution**

Address  
City, Province  
Postal Code

Attention: Branch Manager  
CONFIDENTIAL

To Whom It May Concern,

**Re: Estate of Kelly Smith – Account 000-0000-00**

Enclosed is a copy of Kelly Smith's Death Certificate. As the executor of Kelly Smith's estate, I request that your branch provide the following information to assist with estate settlement:

1. Please confirm all account numbers and the account values as of the date of death.
2. Indicate the names of any persons jointly associated with the account(s).
3. Provide full details for all term deposits, GICs, RRSPs etc.
4. Provide full details of any liabilities Kelly Smith has owing at your branch.
5. Confirm whether or not Kelly Smith had a safety deposit box at your branch.
6. Advise any other details that I should be aware of.

Thank you in advance for the service your branch has provided to date and for your time and attention to this matter.

If you have any questions or concerns, do not hesitate to contact me.

Sincerely,

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Executor's Name  
Address  
City, Province  
Postal Code  
Daytime Phone Number  
Email Address