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Dated

Re: *Estate of* _____, a Florida Resident

Dear

My office represents _____ the personal representative of the estate referenced above. A copy of the Letters of Administration are enclosed for your records.

In an attempt to ascertain and value all of the assets of the deceased for inventory purposes, kindly provide, for each account, the following information:

1. The type of account(s) (checking, savings, CD, etc.);
2. The exact principal balance at the date of death;
3. A separate interest amount for any interest accrued but not posted at the date of death;
4. The exact manner in which the account was held, whether individually, jointly (please furnish the name or names of the joint owners), in trust for (please furnish the name of the trustee and the beneficiary), custodial (please furnish the name of the custodian and beneficiary), convenience or agency (please furnish the name of the principal and the other signatory or agent), etc.;
5. The date the account was opened;
6. The source of the funds to open the account, if known (for example, transfer from another account with your institution);
7. A copy of the signature card (front and back);
8. For CDs, the interest rate and maturity date.

If the deceased owned or had an interest in any other accounts or CDs, or maintained a safe deposit box with your institution, or if you held any other assets for the deceased, please supply me with a description. If the deceased had any loans or guaranteed any loans, please furnish me with a copy of such notes or guarantees, and a description of any security held.

If the bank charges for providing this information, please contact me upon receipt of this letter with that information.

Thank you for your attention to these matters.

Sincerely,

Larry S. Tolchinsky, Esq.