

Information & Instructions: Transfer of stock letters

PREVIEW

1. The following letters are used in the process of transferring stock certificates from the decedent's name into the name of the beneficiary.

Form: Letter to stock broker regarding transfer of decedent's stock

[Date]

[Name and address of addressee]

Attention: Stock Transfer Department

Regarding Estate of _____, Decedent

PLEASE DO NOT COPY

Date of Death: _____

Shares of Stock in [name of issuer]

Dear [Salutation]:

This letter is to advise you that the above-named decedent died on the specified date. The decedent was the apparent owner of the above described stock.

Please advise me of your requirements for transferring this stock, and forward copies of any forms which must be completed.

THIS DOCUMENT

Thank you in advance for your assistance.

Very truly yours

[Attorney's Name]

THANK YOU

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