



Re: Estate Settlement Letter of Direction

To Whom It May Concern,

Please use this letter as authorization to process the transfer(s) of funds from the below estate account to the below listed beneficiaries.

Estate Account Name:
Account Root Number(s):

Receiving Party Details (if applicable)

Internal Money Movement
Optimize Account Holder(s) Name:
Optimize Account Number:

Withdrawal
Recipient Name:
Recipient Address:

Please find the signature(s) below as authorization for this request.

Regards,

Name:
Date:
Relationship:
(Executor or Beneficiary)

Name:
Date:
Relationship:
(Executor or Beneficiary)

Signature Guaranteed By,

Optimize Representative:
Date: