

[Insurer name & Address] [You name & Address]

Date: [xxxxxx]

Dear Sirs

Re: The Estate of [Deceased Name] deceased
Policy number: [Policy Number]

I am the personal representative of the above-named deceased, who died on [DATE]. I have attached the death certificate for you to note and return.

We understand the deceased holds the above policy(s) with you. Please:

1. Provide the policies' surrender and open market valuations as of the date of death.
2. Please advise me of any policies the deceased may have held with you, including those in joint names.
3. Advise of the date of maturity/surrender if applicable.
4. Advise whether the policy is payable to the estate or a nominated beneficiary. If it is payable to a nominated beneficiary, please confirm the date the policy commenced or the date the policy was put into trust for the beneficiary.
5. Forward to me any forms you require completing to pay the claim once we have a Grant in the estate.

I thank you for your help in the above matter. You can contact me by email at [xxxxxx], or you can ring me at [xxxxx].

Yours Sincerely

[Your Name]