

[Pension provider name & Address] [Your name & Address]

Date: [xxxx]

Dear Sirs

Re: The Estate of [Deceased Name]

National Insurance Number: [NI Number]

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

In respect of the above, please:

1. Advise me whether there has been an overpayment or underpayment of pension. Please note that any overpayment will be settled once we receive the Grant of Probate and sufficient funds.
2. Ensure no further payments are made to the deceased's bank account.
3. Please advise me of the amount of pension paid for the current tax year.
4. Please advise me of the amount of any lump sum, pension or discretion repayments which the estate or third parties can claim.
5. Please provide me with the tax deduction certificate.
6. Confirm details of the tax district and tax reference.

I thank you for your assistance in this matter. You can email me at [xxxxx] or ring me on [xxxx]

Yours Sincerely

[Your Name]