

Completed Sample of a Final Distribution of Estate Assets Letter

January 10, 2026

Dear Jane Doe,

This letter serves as formal notice that the Estate of John A. Smith is ready for final distribution. In accordance with Mr. Smith's Last Will and Testament and the applicable probate proceedings, the estate assets will now be distributed as outlined below.

Estate Assets

Real Estate

123 Estate Lane
Cityville, California 98765

Bank Accounts

Savings Account ending in 5678
Checking Account ending in 1234

Investment Account

XYZ Investments Brokerage Account

Personal Property

Household furnishings, artwork, jewelry, family heirlooms, and a 2022 automobile

Beneficiary Distribution

Jane Doe — 50% of the estate
John Smith — 30% of the estate
Mary Johnson — 20% of the estate

Distribution Details

The residence will be transferred according to the terms of the will.

Funds held in the bank accounts will be distributed according to each beneficiary's percentage of the estate.

The investment account will either be transferred or liquidated in accordance with the estate plan and applicable financial institution requirements.

Personal property will be distributed according to the written instructions contained in the will. If no specific instructions exist, the beneficiaries will coordinate the distribution with the executor.

Distribution Schedule

Asset transfers will begin on January 15, 2026, and are expected to be completed by February 28, 2026. Please return any requested documents promptly to avoid delays in completing your distribution.

Acknowledgment of Receipt

After receiving your inheritance, please sign and return the enclosed acknowledgment confirming receipt of your distribution.

Questions

If you have questions regarding your inheritance, please contact me at:

Phone: (555) 555-5555

Email: executor@email.com

Thank you for your patience and cooperation throughout the estate administration process.

Sincerely,

Robert Wilson

Executor of the Estate of John A. Smith