

# Date of Death Value Letter Request Form

## Date of Death Value Letter Request Directions

A date of death value letter provides account balance information on the date the account owner passed away. The date of death letter may only be requested by the decedent account's authorized representative: joint account owner, payable on death beneficiary, executor, estate administrator, or small estate beneficiary.

To request a date of death value letter, the authorized representative will need to:

Gather the following documents:

- 1 One original Death Certificate
- 2 A notarized [BMO Alto Date of Death Value Letter Request Form](#)
- 3 A copy of one valid form of ID for the authorized representative:
  - Driver's license
  - State Identification card
  - Passport/Passport Card
  - Permanent Resident Card
  - Tribal ID card
  - Consulate/Consular Identification Card
- 4 As applicable, copies of executorship documentation or state-specific Small Estate Affidavit

Mail the documents to:

**BMO Alto**  
320 S. Canal St.  
Floor 11  
Chicago, IL 60606

**If you have questions, call us at 1-855-266-8100.**

# Date of Death Value Letter Request Form

## Decedent Information

\_\_\_\_\_

First name

\_\_\_\_\_

Last name

## Account Information

All Accounts

Only the Accounts listed here:

Account number \_\_\_\_\_

Account number \_\_\_\_\_

Account number \_\_\_\_\_

Account number \_\_\_\_\_

Account number \_\_\_\_\_

Account number \_\_\_\_\_

## Representative Information

Relationship to decedent

\_\_\_\_\_

First name

\_\_\_\_\_

Last name

\_\_\_\_\_

Phone number

\_\_\_\_\_

Mailing address

\_\_\_\_\_

City

\_\_\_\_\_

State

\_\_\_\_\_

Zip code

\_\_\_\_\_

Representative signature

\_\_\_\_\_

Date

## Notarial Acknowledgment

State of \_\_\_\_\_

County of \_\_\_\_\_

Signed and attested before me on \_\_\_\_\_ (date) by

\_\_\_\_\_ (name of representative).

(Seal)

\_\_\_\_\_

(Signature of Notary Public)