SAMPLE LETTER ONLY

PLEASE PREPARE THIS LETTER ON YOUR BUSINESS STATIONERY AND MAIL DIRECTLY TO YOUR ASSET MANAGER/FINANCIAL INSTITUTION. THANK YOU

Asset Manager/Financial Institution
_____
_____

Re: Plan FBO
Account #

To Whom It May Concern:

Please arrange to have monthly statements NOT individual **Confirmation of Transactions,** for the above mentioned Plan to be sent to my third party administrator at the address below:

Professional Pension Planners, Inc.
1053 Saw Mill River Road
Suite 204
Ardsley, NY 10502-1045

Very truly yours,

By: _____
PLAN TRUSTEE

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