

**Date:** \_\_\_\_\_

Internal Revenue Service  
IRS Letter Forwarding Request  
Disclosure Office

**Address:** \_\_\_\_\_

**City, State, Zip** \_\_\_\_\_

Re: **Plan Name:** \_\_\_\_\_

Dear Agent,

We have been unable to locate a terminated participant from the company's above referenced qualified retirement plan. Because this participant is entitled to a distribution of money from the plan, we are requesting your assistance to forward notification to them of this benefit. We understand there is no charge for this service and that any reply that we'll receive will need to come directly from the participant.

The last known address and the social security number of the participant are as follows:

**Name:** \_\_\_\_\_

**Social Security Number:** \_\_\_\_\_

**Last Known Address:** \_\_\_\_\_

**Last Known City, State, Zip:** \_\_\_\_\_

Enclosed is one letter for which we are requesting your help in forwarding on our behalf.

Thank you for your assistance.

Yours truly,

**Name of Trustee:** \_\_\_\_\_