Date of Death Value Letter Request Form

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 affiant. 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 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:

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

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

Alto.

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 Select relationship

First name _____ Last name _____

Social Security number _____ Date of birth _____

Phone number _____ Email address _____

Mailing address _____

City _____ State _____ Zip code _____

Signature _____ Date _____

Notarial Acknowledgment

State of _____

County of _____

Signed and attested before me on _____ (date) by

_____ (name of representative).

(Seal)

_____
(Signature of Notary Public)

Alto.

Alto is a trade name used by BMO Bank N.A. Deposits made through Alto and in other U.S. accounts under the BMO brand name are not separately insured by the FDIC and count towards your FDIC deposit insurance limit at BMO Bank N.A. Accounts are subject to approval and are provided in the United States by BMO Bank N.A. Member FDIC

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