

Application for Beneficiary Tax Records

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient's Name]

[Department/Company Name]

[Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I am writing to formally request the tax records of the beneficiaries associated with the account/reference number [Insert Account/Reference Number]. This request is made in accordance with my rights as a beneficiary.

For your reference, I have attached the necessary documents, including identification and proof of my beneficiary status. Please let me know if you require any additional information to process this request.

Thank you for your assistance in this matter. I look forward to your prompt response.

Sincerely,

[Your Name]