

Notification Request for Beneficiary Tax Information

Date: [Insert Date]

[Your Name]

[Your Title]

[Your Company/Organization]

[Your Address]

[City, State, Zip Code]

Email: [Your Email]

Phone: [Your Phone Number]

Dear [Beneficiary's Name],

We hope this message finds you well. As part of our record-keeping process and in compliance with tax regulations, we kindly request your assistance in providing the necessary tax information for your beneficiary account.

Please provide the following information:

- Tax Identification Number (TIN)
- Completed W-9 Form (if applicable)
- Any additional relevant tax documentation

We appreciate your prompt attention to this matter. Please send the requested information by [insert deadline] to ensure compliance with current tax regulations.

If you have any questions or require further assistance, feel free to contact us at [Your Phone Number] or [Your Email].

Thank you for your cooperation.

Sincerely,

[Your Name]

[Your Title]

[Your Company/Organization]