

# Beneficiary Financial Record Application

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, ZIP Code]

[Email Address]

[Phone Number]

[Recipient Name]

[Recipient Title]

[Organization Name]

[Recipient Address]

[City, State, ZIP Code]

Dear [Recipient Name],

I am writing to formally request a copy of my financial records as a beneficiary under [Specify Account or Policy Number]. This request is made in accordance with the relevant policies and procedures.

Please send the requested records to my address listed above or contact me at [your phone number] should you require any further information to process my request.

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

Sincerely,

[Your Name]