

Beneficiary Financial Summary Request

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, ZIP Code]

[Your Email]

[Your Phone Number]

[Recipient's Name]

[Company/Organization Name]

[Company Address]

[City, State, ZIP Code]

Dear [Recipient's Name],

I hope this message finds you well. I am writing to formally request a financial summary of the beneficiary accounts associated with [specific reference number, account name, or policy number].

As the beneficiary, it is important for me to have a comprehensive understanding of the current financial status of the account(s). Please include details such as account balances, recent transactions, and any relevant changes that may have occurred.

I would appreciate your prompt attention to this matter, and I look forward to your response. If you require any further information to fulfill this request, please do not hesitate to contact me at [Your Phone Number] or [Your Email].

Thank you for your assistance.

Sincerely,

[Your Name]