

# Beneficiary Estate Plan Access Request

[Your Name]  
[Your Address]  
[City, State, Zip Code]  
[Email Address]  
[Phone Number]  
[Date]

[Recipient's Name]  
[Recipient's Title]  
[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 access to the estate plan of [Name of the Deceased] as outlined in your records. As a designated beneficiary, I would like to understand the details regarding the distribution of assets and any pertinent information related to the estate.

Additionally, I would like to express my communication preferences regarding any updates or discussions related to the estate plan. I prefer to be contacted via [preferred communication method: email, phone, etc.], and I appreciate receiving information in a timely manner.

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

Sincerely,

[Your Name]

[Your Signature (if sending a hard copy)]