

Beneficiary Stock Transfer Request

[Your Name]

[Your Address]

[City, State, ZIP Code]

[Email Address]

[Phone Number]

[Date]

[Brokerage Firm's Name]

[Brokerage Firm's Address]

[City, State, ZIP Code]

Subject: Beneficiary Stock Transfer Request

Dear [Brokerage Firm's Name or Specific Person's Name],

I am writing to formally request the transfer of stock to my ownership as the designated beneficiary, as per the instructions outlined in [Name of Decedent's Account or Will].

Details of the transfer request are as follows:

- Account Holder (Deceased): [Deceased's Name]
- Account Number: [Account Number]
- Stocks to be Transferred: [List of Stocks with Ticker Symbols and Number of Shares]
- Beneficiary's Name: [Your Name]
- Beneficiary's Account Number (if applicable): [Your Account Number]

Enclosed are copies of the documentation supporting this transfer, including [List of Documents, e.g., death certificate, will, etc.]. Please process this request at your earliest convenience.

Thank you for your attention to this matter. Should you require any additional information or documentation, please do not hesitate to contact me.

Sincerely,

[Your Name]