

# Beneficiary Appointment Letter

Date: [Insert Date]

To,  
[Recipient's Name]  
[Recipient's Address]  
[City, State, Zip Code]

Subject: Appointment of Beneficiary for Mutual Fund Investments

Dear [Recipient's Name],

I, [Your Name], residing at [Your Address], hereby appoint the following individual as the beneficiary for my mutual fund investments:

**Beneficiary Details:**

Name: [Beneficiary's Name]  
Relationship: [Relationship to Beneficiary]  
Date of Birth: [Beneficiary's Date of Birth]  
Address: [Beneficiary's Address]

This appointment is made in accordance with my wishes regarding the distribution of my assets in the event of my demise.

Please update your records to reflect this appointment. I trust that this action will be honored under the terms of the mutual fund agreements.

Thank you for your attention to this matter.

Sincerely,  
[Your Signature (if sending a hard copy)]  
[Your Name]  
[Your Contact Information]