

Notification of Beneficiary Rights

Date: [Insert Date]

Dear [Mutual Fund Holder's Name],

We are writing to you regarding your investment in [Mutual Fund Name]. As a mutual fund holder, it is important to inform you of your beneficiary rights in the event of your passing.

1. **Designation of Beneficiary:** You have the right to designate a beneficiary for your mutual fund accounts. Please make sure that your beneficiary information is up to date.
2. **Rights of the Beneficiary:** Upon your passing, your named beneficiary will have the right to access and manage your mutual fund assets as per the terms of the fund.
3. **Updating Beneficiary Information:** If you would like to add, change, or remove a beneficiary, please contact our customer service at [Customer Service Number] or visit [Website URL].

We recommend reviewing your beneficiary designations periodically to ensure they reflect your current wishes.

If you have any questions or need further assistance, please do not hesitate to reach out to us.

Sincerely,

[Your Name]

[Your Position]

[Company Name]

[Company Contact Information]