

Mutual Fund Allocation Request

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient's Name]

[Recipient's Title]

[Mutual Fund Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I am writing to formally request the allocation of mutual fund units to the following beneficiaries as per the attached investment guidelines.

Beneficiary Details:

- **Name:** [Beneficiary 1 Name]
- **Allocation Percentage:** [Percentage]
- **Relationship:** [Relationship]

- **Name:** [Beneficiary 2 Name]
- **Allocation Percentage:** [Percentage]
- **Relationship:** [Relationship]

Attached are the required documents supporting this request.

Please let me know if you need any more information or documentation to process this request.

Thank you for your attention to this matter.

Sincerely,

[Your Name]