

Mutual Fund Beneficiary Change Notice

Date: [Insert Date]

To,

[Recipient's Name]

[Recipient's Address]

[City, State, Zip Code]

Dear [Recipient's Name],

We are writing to inform you of a change in the beneficiary designation for your mutual fund account with us.

Account Number: [Insert Account Number]

Previous Beneficiary: [Insert Previous Beneficiary Name]

New Beneficiary: [Insert New Beneficiary Name]

This change is effective as of [Insert Effective Date]. Please ensure that your records are updated accordingly.

If you have any questions or require further information, please do not hesitate to contact us at [Insert Contact Information].

Thank you for your attention to this matter.

Sincerely,

[Your Name]

[Your Title]

[Company Name]

[Company Address]

[City, State, Zip Code]

[Contact Information]