

Mutual Fund Beneficiary Transfer Instructions

Date: [Insert Date]

[Your Name]
[Your Address]
[City, State, Zip Code]
[Email Address]
[Phone Number]

To,
[Mutual Fund Company Name]
[Company Address]
[City, State, Zip Code]

Subject: Request for Beneficiary Transfer

Dear [Recipient's Name],

I am writing to request the transfer of beneficiary designation for my mutual fund account, [Account Number]. The details are as follows:

Current Beneficiary Information:

Name: [Current Beneficiary Name]
Relationship: [Relationship]
Date of Birth: [DOB]
Social Security Number: [SSN]

New Beneficiary Information:

Name: [New Beneficiary Name]
Relationship: [Relationship]
Date of Birth: [DOB]
Social Security Number: [SSN]

Please find attached the necessary documentation to process this request. I understand that this transfer will take effect after your review and approval.

Thank you for your attention to this matter. Please feel free to contact me if you require any additional information.

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