

Retirement Account Beneficiary Statement

Date: [Insert Date]

Account Holder Name: [Insert Account Holder Name]

Account Number: [Insert Account Number]

Beneficiary Information Update

Dear [Insert Beneficiary Name],

We are writing to inform you that the beneficiary designation for the account listed above has been updated. Please review the details below:

Current Beneficiary Designation:

- Name: [Insert Beneficiary Name]
- Relationship: [Insert Relationship]
- Percentage Allocated: [Insert Percentage]

Updated Beneficiary Designation:

- Name: [Insert New Beneficiary Name]
- Relationship: [Insert New Relationship]
- Percentage Allocated: [Insert New Percentage]

If you have any questions regarding this update, please do not hesitate to contact us at [Insert Contact Information].

Thank you for your attention to this matter.

Sincerely,

[Insert Your Name]

[Insert Your Title]

[Insert Company Name]

[Insert Company Address]