

# Beneficiary Restricted Access Authorization

Date: [Insert Date]

To Whom It May Concern,

I, [Your Name], the authorized representative of [Beneficiary Name], hereby grant permission for restricted access to the investment portfolios held under the name of [Beneficiary Name]. This authorization is intended for the purpose of [specify reason, e.g., monitoring performance, managing accounts].

Details of the authorized individual:

- Name: [Authorized Person's Name]
- Relationship to Beneficiary: [Relationship]
- Contact Information: [Phone Number, Email Address]

This authorization is valid from [start date] to [end date] unless revoked in writing. Please provide the necessary access to the investment portfolios as outlined in this letter.

Thank you for your attention to this matter.

Sincerely,

[Your Signature]

[Your Printed Name]

[Your Address]

[Your Contact Information]