

# Beneficiary Restricted Access Authorization

Date: [Insert Date]

To: [Financial Institution Name]

Address: [Financial Institution Address]

Subject: Beneficiary Restricted Access Authorization for Retirement Accounts

Dear [Recipient's Name],

I, [Your Name], am writing to formally authorize restricted access to my retirement accounts listed under my name. Below are the details of the accounts:

- Account Type: [e.g., 401(k), IRA]
- Account Number: [Insert Account Number]

This authorization grants access to the following beneficiary(ies):

- Name of Beneficiary 1: [Full Name, Relationship]
- Name of Beneficiary 2: [Full Name, Relationship]

The access granted shall be limited to inquiries regarding the account balance, alongside the ability to initiate withdrawals or changes in beneficiary designations only upon the occurrence of my death.

Please confirm the receipt of this letter and the execution of this authorization.

Thank you for your attention to this matter.

Sincerely,

[Your Signature]

[Your Printed Name]

[Your Address]

[Your Phone Number]

[Your Email Address]