

Beneficiary Asset Allocation Verification

Date: [Insert Date]

To: [Insert Recipient Name]

Address: [Insert Recipient Address]

Dear [Recipient Name],

We are writing to confirm the details of the asset allocation for the beneficiary account associated with [Insert Account Number or Identifier]. As part of our ongoing commitment to transparency, we request your verification of the following asset allocations:

Asset Allocation Summary:

- Asset Class 1: [Insert Details] - [Insert Percentage or Value]
- Asset Class 2: [Insert Details] - [Insert Percentage or Value]
- Asset Class 3: [Insert Details] - [Insert Percentage or Value]

Please review the above information and confirm its accuracy by signing below and returning this letter to us by [Insert Deadline]. If you have any questions or require further information, do not hesitate to contact us at [Insert Contact Information].

Thank you for your attention to this matter.

Sincerely,

[Your Name]

[Your Position]

[Company/Organization Name]

[Company Address]

[Contact Information]

Signature of Beneficiary