

# Beneficiary Selection Discussion

Date: [Insert Date]

To: [Recipient's Name]

From: [Your Name]

Subject: Discussion on Beneficiary Selection for Retirement Accounts

Dear [Recipient's Name],

I hope this message finds you well. As we prepare for the upcoming review of your retirement account, I would like to schedule a discussion regarding the selection of beneficiaries. It is crucial to ensure that your retirement assets are allocated according to your wishes and that your loved ones are appropriately considered.

During our discussion, we will cover:

- The importance of choosing the right beneficiary
- Current retirement account beneficiary designations
- Potential implications of your selections
- Updates to consider based on life changes (marriage, divorce, etc.)

Please let me know your availability for this discussion, and I will do my best to accommodate. Your financial security is our top priority, and we want to ensure that your retirement goals align with your beneficiary choices.

Thank you for your attention to this important matter. I look forward to hearing from you soon.

Sincerely,

[Your Name]

[Your Title]

[Your Contact Information]