

Beneficiary Succession Clarification

Date: [Insert Date]

To: [Recipient's Name]

Title: [Recipient's Title]

Company Name: [Company Name]

Address: [Address Line 1]

[Address Line 2]

[City, State, Zip Code]

Dear [Recipient's Name],

I am writing to clarify the beneficiary succession for my financial accounts held with [Company Name]. As per my records, the designated beneficiaries are outlined as follows:

- **Account Type:** [Insert Account Type]
- **Primary Beneficiary:** [Name of Beneficiary]
- **Contingent Beneficiary:** [Name of Contingent Beneficiary]

It is crucial that this information is accurately reflected to avoid any potential complications in the future.

Please let me know if any further documentation or actions are required on my part to confirm this succession. I appreciate your prompt attention to this matter.

Thank you for your cooperation.

Sincerely,

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email]

[Your Phone Number]