

Inquiry About Contingent Beneficiaries

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Date]

[Recipient Name]

[Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient Name],

I hope this message finds you well. I am writing to inquire about the contingent beneficiaries associated with my investment accounts under your management.

Could you please provide me with information regarding my current contingent beneficiaries? Additionally, I would like to know the process for making any changes or updates if necessary.

Thank you for your assistance, and I look forward to your prompt response.

Sincerely,

[Your Name]