

Beneficiary Designation Letter

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email]

[Your Phone Number]

To Whom It May Concern,

I, [Your Full Name], born on [Your Date of Birth], residing at [Your Address], hereby designate the following individuals as beneficiaries of my financial assets, including but not limited to bank accounts, retirement accounts, insurance policies, and investment accounts.

Beneficiary Information

Primary Beneficiary:

Name: [Beneficiary Full Name]

Contingent Beneficiary:

Name: [Contingent Beneficiary Full Name]

Relationship: [Relationship to You]

Date of Birth: [Contingent Beneficiary's Date of Birth]

Percentage of Assets: [Percentage or Amount]

This designation shall remain in effect until I provide written notice of any changes. I understand that this designation should be formally acknowledged by the financial institutions holding my assets.

Thank you for your attention to this matter.

Sincerely,

[Your Signature]

[Your Printed Name]