

Beneficiary Directive Request

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient Name]

[Recipient Address]

[City, State, Zip Code]

Subject: Request for Beneficiary Directive

Dear [Recipient Name],

I hope this message finds you well. I am writing to formally request the establishment or modification of my beneficiary directive. I wish to ensure that my wishes regarding the distribution of my assets are clearly noted and respected.

Please find the relevant details below:

- **Full Name:** [Your Full Name]
- **Social Security Number:** [Your SSN]
- **Account Numbers:** [List of Accounts]
- **Beneficiaries:** [List of Beneficiaries with relevant details]

If any additional information or documentation is required, please feel free to reach out to me at your convenience. I appreciate your assistance in this matter.

Thank you for your attention to this request. I look forward to your prompt response.

Sincerely,

[Your Name]