

Investment Account Transfer Request

Date: [Insert Date]

[Your Name]
[Your Address]
[City, State, Zip Code]
[Email Address]
[Phone Number]

[Recipient's Name]
[Financial Institution's Name]
[Institution's Address]
[City, State, Zip Code]

Dear [Recipient's Name],

I am writing to request the transfer of my investment account to designate a beneficiary as per my recent decision regarding estate planning. Please find the details of my current account below:

Account Holder Name: [Your Full Name]
Account Number: [Your Account Number]
Type of Account: [Type of Investment Account]

As per my wish, I would like to designate the following individual as the beneficiary of this account:

Beneficiary Name: [Beneficiary's Full Name]
Relationship to Account Holder: [Relationship]
Beneficiary Contact Information: [Beneficiary's Address, Email, Phone Number]

Please process this request at your earliest convenience and confirm when the transfer is complete. Should you require any further information or documentation, feel free to reach out to me at the contact information provided above.

Thank you for your attention to this matter.

Sincerely,

[Your Signature (if sending a hard copy)]
[Your Printed Name]