

Beneficiary Change Form Submission

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, ZIP Code]

[Email Address]

[Phone Number]

[Recipient Name]

[Recipient Title]

[Company/Organization Name]

[Company Address]

[City, State, ZIP Code]

Dear [Recipient Name],

I am writing to formally submit my request for a change of beneficiary as part of my estate planning process. Please find the completed Beneficiary Change Form attached for your review.

Current Beneficiary:

[Current Beneficiary Name]

[Relation to you]

New Beneficiary:

[New Beneficiary Name]

[Relation to you]

I request that you update your records accordingly and confirm the completion of this change at your earliest convenience. Should you require any additional information or documentation, please do not hesitate to contact me.

Thank you for your attention to this matter.

Sincerely,

[Your Signature (if sending by mail)]

[Your Printed Name]