

# Beneficiary Modification Request

Date: [Insert Date]

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

[Retirement Plan Administrator's Name]  
[Company/Plan Name]  
[Company Address]  
[City, State, Zip Code]

Dear [Retirement Plan Administrator's Name],

I am writing to formally request a modification to the beneficiary designation of my retirement plan account ([Account Number]).

Currently, my beneficiary is listed as:

[Current Beneficiary Name]  
[Current Beneficiary Relationship]

I would like to change my beneficiary to:

[New Beneficiary Name]  
[New Beneficiary Relationship]  
[New Beneficiary Address]

Please find all required documentation attached to support this modification request. I understand that any updates will take effect once processed.

Thank you for your attention to this matter. Please confirm once the changes have been made or if further information is required.

Sincerely,

[Your Name]