

Event-Driven Beneficiary Change Request

[Your Name]

[Your Address]

[City, State, ZIP Code]

[Email Address]

[Phone Number]

[Date]

[Recipient's Name]

[Recipient's Title]

[Organization Name]

[Organization Address]

[City, State, ZIP Code]

Subject: Request for Change of Beneficiary

Dear [Recipient's Name],

I hope this message finds you well. I am writing to formally request a change of beneficiary for my [specify type of account or policy], due to [briefly explain the reason/event that necessitated the change, e.g., marriage, divorce, change in circumstances].

Currently, my beneficiary is [Current Beneficiary's Name]. I would like to change it to [New Beneficiary's Name], with the following details:

- Name: [New Beneficiary's Full Name]
- Date of Birth: [New Beneficiary's Date of Birth]
- Relationship to Me: [Relationship]
- Contact Information: [Phone Number, Email]

Attached are the necessary documents to support this request, including [list any supporting documents, e.g., identification proof, marriage certificate].

I kindly ask for your assistance in processing this request 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 Name]