

Beneficiary Information Update

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, ZIP]

[Email Address]

[Phone Number]

[Investment Firm Name]

[Firm Address]

[City, State, ZIP]

Dear [Investment Firm Contact Name],

I am writing to formally update the beneficiary information on my investment account with the account number [Insert Account Number].

Please find the new beneficiary information below:

- **Beneficiary Name:** [Insert Beneficiary Name]
- **Relationship:** [Insert Relationship]
- **Date of Birth:** [Insert Date of Birth]
- **Social Security Number:** [Insert SSN]
- **Address:** [Insert Address]
- **City, State, ZIP:** [Insert City, State, ZIP]

I understand that this update may require additional documentation, and I am prepared to provide any necessary information to facilitate this change.

Thank you for your attention to this matter. Please confirm receipt of this request and let me know if there are any further steps I need to take.

Sincerely,

[Your Signature (if sending a hard copy)]

[Your Printed Name]