

# Beneficiary Assignment Alteration Letter

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Recipient's Name]

[Recipient's Title]

[Company/Organization Name]

[Company Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I am writing to formally request an alteration to my existing beneficiary assignment for [specify policy or account]. I would like to update the beneficiaries as follows:

## **Current Beneficiary:**

Name: [Current Beneficiary Name]

Relationship: [Current Beneficiary Relationship]

Percentage: [Current Beneficiary Percentage]

## **New Beneficiary:**

Name: [New Beneficiary Name]

Relationship: [New Beneficiary Relationship]

Percentage: [New Beneficiary Percentage]

Please let me know if you require any additional information or documentation to process this request. Thank you for your attention to this matter.

Sincerely,

[Your Signature (if sending a hard copy)]

[Your Printed Name]