

Beneficiary Designation Transfer Letter

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Insurance Company/Institution Name]

[Insurance Company Address]

[City, State, Zip Code]

Subject: Request for Beneficiary Designation Transfer

Dear [Recipient's Name],

I am writing to formally request a transfer of the beneficiary designation for my policy/account number [Insert Policy/Account Number]. I would like to designate the following individual as my new beneficiary:

New Beneficiary Information:

Name: [New Beneficiary's Name]

Relationship: [Relationship to You]

Address: [New Beneficiary's Address]

Email: [New Beneficiary's Email]

Phone Number: [New Beneficiary's Phone Number]

Please let me know if you require any further information or documentation to process this request. I appreciate your prompt attention to this matter.

Sincerely,

[Your Name]