

# Beneficiary Change Notice

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email]

[Your Phone Number]

To Whom It May Concern:

I am writing to formally notify you of a change in the beneficiary designation for my retirement assets held under [Account Name or Plan Name].

The details of the change are as follows:

## **Current Beneficiary Information:**

Name: [Current Beneficiary Name]

Relationship: [Relationship to Current Beneficiary]

Percentage: [Percentage]%

## **New Beneficiary Information:**

Name: [New Beneficiary Name]

Relationship: [Relationship to New Beneficiary]

Percentage: [Percentage]%

Please update your records accordingly and confirm the change in beneficiary designation at your earliest convenience. If you require any further information or documentation, do not hesitate to contact me.

Thank you for your attention to this matter.

Sincerely,

[Your Name]

[Your Signature (if sending a hard copy)]