

Beneficiary Information Amendment

Date: _____

To: [Retirement Plan Administrator's Name]

[Retirement Plan Administrator's Company]

[Company Address]

[City, State, Zip Code]

Dear [Retirement Plan Administrator's Name],

I am writing to formally request an amendment to my beneficiary information for my retirement savings plan, account number [Account Number].

As of [Effective Date of Change], I would like to update my beneficiary designation as follows:

- **Primary Beneficiary:** [Full Name, Relationship, and Contact Information]
- **Contingent Beneficiary:** [Full Name, Relationship, and Contact Information]

Please update your records accordingly. I appreciate your prompt attention to this matter. If you require any additional information or documentation, please don't hesitate to contact me at [Your Phone Number] or [Your Email Address].

Thank you for your assistance.

Sincerely,

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Phone Number]

[Your Email Address]