

Change in Retirement Plan Beneficiary

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

To Whom It May Concern,

I am writing to formally request a change to the beneficiary designation for my retirement plan with [Name of Retirement Plan or Company]. My details are as follows:

Account Holder: [Your Full Name]

Account Number: [Your Account Number]

Previously designated beneficiary:

[Name of Previous Beneficiary]

New beneficiary designation:

[Name of New Beneficiary]

[Relationship to You]

[Date of Birth of New Beneficiary]

[Social Security Number of New Beneficiary, if required]

Please process this change at your earliest convenience. I understand that a confirmation of this change will be sent to my address upon completion.

Thank you for your attention to this matter.

Sincerely,

[Your Signature (if sending a hard copy)]

[Your Printed Name]