

Retirement Account Beneficiary Modification

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Retirement Account Provider's Name]

[Retirement Account Provider's Address]

[City, State, Zip Code]

Subject: Beneficiary Modification Request

Dear [Retirement Account Provider's Name],

I am writing to formally request a modification to the beneficiary designation for my retirement account.

Account Number: [Insert Account Number]

Current Beneficiary:

[Current Beneficiary Name]

[Relationship to Current Beneficiary]

New Beneficiary:

[New Beneficiary Name]

[Relationship to New Beneficiary]

Please update my beneficiary designation accordingly and confirm once this change has been made.

Thank you for your attention to this matter.

Sincerely,

[Your Signature (if sending a hard copy)]

[Your Printed Name]