

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Plan Administrator's Name]

[Company/Plan Name]

[Company Address]

[City, State, Zip Code]

Dear [Plan Administrator's Name],

I am writing to formally update my beneficiary designation for my retirement plan. Please find the revised information below:

Account Holder: [Your Name]

Plan Name: [Retirement Plan Name]

New Beneficiary Information:

- **Name:** [Beneficiary's Name]
- **Relationship:** [Beneficiary's Relationship]
- **Date of Birth:** [Beneficiary's Date of Birth]
- **Social Security Number:** [Beneficiary's SSN]

I request that you update my beneficiary designation according to this information. If you need any further information or forms to process this update, please let me know.

Thank you for your attention to this matter.

Sincerely,

[Your Signature (if sending a hard copy)]

[Your Printed Name]