

Retirement Plan Beneficiary Reallocation

Date: [Insert Date]

Dear [Plan Administrator's Name],

I hope this message finds you well. I am writing to formally request a reallocation of beneficiaries for my retirement plan, [Plan Name or Account Number], as per the guidelines established.

Current Beneficiary Information

- Primary Beneficiary: [Current Beneficiary Name] - [Relationship]
- Contingent Beneficiary: [Current Contingent Beneficiary Name] - [Relationship]

New Beneficiary Information

- Primary Beneficiary: [New Beneficiary Name] - [Relationship]
- Contingent Beneficiary: [New Contingent Beneficiary Name] - [Relationship]

Please let me know if you require any further information or documentation to process this change. I appreciate your attention to this matter.

Thank you for your assistance.

Sincerely,

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Phone Number]

[Your Email Address]