

Beneficiary Reassignment Notification

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Retirement Plan Administrator's Name]

[Retirement Plan Company Name]

[Company Address]

[City, State, Zip Code]

Subject: Retirement Plan Beneficiary Reassignment

Dear [Retirement Plan Administrator's Name],

I am writing to formally request a reassignment of the beneficiary for my retirement plan, account number [Account Number]. As of [Effective Date], I wish to designate the following individual(s) as my new beneficiary(ies):

- **Name:** [New Beneficiary Name]
- **Relationship:** [Relationship to You]
- **Social Security Number:** [New Beneficiary SSN]
- **Date of Birth:** [New Beneficiary DOB]

In addition, please remove the previously designated beneficiary:

- **Name:** [Old Beneficiary Name]

Thank you for your assistance in processing this request. Should you require any further information or documentation, please do not hesitate to contact me at [Your Phone Number] or [Your Email Address].

Sincerely,

[Your Name]