

Beneficiary Change Request

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email Address]

[Your Phone Number]

To: [Retirement Plan Administrator's Name]

[Retirement Plan Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Retirement Plan Administrator's Name],

I am writing to formally request a change to the beneficiaries of my retirement portfolio. My details are as follows:

Account Holder Name: [Your Name]

Account Number: [Your Account Number]

Current Beneficiary:

[Current Beneficiary Name] - [Relationship] - [Percentage]

New Beneficiary Details:

Beneficiary Name: [New Beneficiary Name]

Relationship: [Relationship]

Percentage: [Percentage]

I understand that this request will be processed according to your company's policies and I appreciate your assistance with this matter. Please confirm the changes at your earliest convenience.

Thank you for your attention to this request.

Sincerely,

[Your Signature (if sending a hard copy)]

[Your Printed Name]