

Beneficiary Designation Update

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Institution/Company Name]

[Institution Address]

[City, State, Zip Code]

Dear [Recipient's Name],

I am writing to formally request an update to my beneficiary designation for my [specify account, policy, or plan name] effective immediately. Please find my current beneficiary details below:

Current Beneficiary Information:

Name: [Current Beneficiary Name]

Relationship: [Relationship to You]

Date of Birth: [DOB]

New Beneficiary Information:

Name: [New Beneficiary Name]

Relationship: [Relationship to You]

Date of Birth: [DOB]

Thank you for your assistance in processing this update. Please confirm receipt of this letter and let me know if any further information or documentation is needed.

Sincerely,

[Your Signature (if sending a hard copy)]

[Your Name]