

Request to Amend Beneficiary Information

Date: [Insert Date]

[Your Name]
[Your Address]
[City, State, Zip Code]
[Email Address]
[Phone Number]

[Account Holder's Name]
[Bank/Financial Institution Name]
[Institution Address]
[City, State, Zip Code]

Dear [Account Holder's Name],

I hope this letter finds you well. I am writing to formally request an amendment to the beneficiary information associated with my account [Insert Account Number].

Currently, the beneficiary listed on my account is [Current Beneficiary Name], and I would like to change this to [New Beneficiary Name]. The reason for this request is [Insert Reason].

Please find attached the necessary documentation to support this request, including proof of identity and any additional forms required by your institution.

I appreciate your prompt attention to this matter and look forward to your confirmation of the change.

Thank you for your assistance.

Sincerely,

[Your Signature (if sending a hard copy)]
[Your Printed Name]