

Beneficiary Identification Authorization Letter

Date: [Insert Date]

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

To Whom It May Concern,

I, [Your Name], am writing to formally identify and authorize the following individuals as beneficiaries for my retirement accounts.

Beneficiary Information

Name: [Beneficiary Name 1]
[Relationship to You]
[SSN]
[DOB]

Name: [Beneficiary Name 2]
[Relationship to You]
[SSN]
[DOB]

I authorize the distribution of my retirement accounts to the aforementioned individuals upon my death. Please update your records accordingly.

Thank you for your attention to this matter.

Sincerely,

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