

Beneficiary Designation Clarification

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, ZIP Code]

[Your Email Address]

[Your Phone Number]

[Recipient's Name]

[Company/Institution Name]

[Company Address]

[City, State, ZIP Code]

Dear [Recipient's Name],

I am writing to clarify the designation of beneficiaries on my account(s) with [Company/Institution Name]. The details of the accounts are as follows:

- Account Type: [Account Type]
- Account Number: [Account Number]

The beneficiaries listed are:

- Beneficiary 1: [Name] - [Relationship] - [Percentage or Amount]
- Beneficiary 2: [Name] - [Relationship] - [Percentage or Amount]

If there are any discrepancies in the beneficiary designation or further documentation is required, please let me know as soon as possible. I would like to ensure that all my wishes are clearly understood and correctly documented.

Thank you for your attention to this matter. I look forward to your prompt response.

Sincerely,

[Your Name]