

Insurance Policy Transfer Request Letter

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email]

[Your Phone Number]

[Insurance Company Name]

[Insurance Company Address]

[City, State, Zip Code]

Dear [Insurance Representative's Name],

I am writing to request the transfer of my insurance policy as part of my estate planning. The details of the policy are as follows:

- Policy Number: [Insert Policy Number]
- Type of Policy: [Insert Type of Policy]
- Insured Person: [Insert Insured Person's Name]

I wish to transfer the ownership of this policy to [Insert New Owner's Name], effective immediately. The new owner's details are as follows:

- Name: [Insert New Owner's Name]
- Address: [Insert New Owner's Address]
- City, State, Zip Code: [Insert New Owner's City, State, Zip Code]

Please let me know if you require any additional information or documentation to process this request. I appreciate your prompt attention to this matter.

Thank you for your assistance.

Sincerely,

[Your Name]