

Request for Beneficiary Access to Policy Records

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Insurance Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Insurance Company Representative's Name],

I am writing to formally request access to the policy records of [Policyholder's Name], who is my [relationship to policyholder, e.g., spouse, parent, etc.]. As a designated beneficiary, I believe it is my right to review the relevant records pertaining to this policy.

The details of the policy are as follows:

- Policy Number: [Insert Policy Number]
- Policyholder's Name: [Insert Name]
- Type of Policy: [Insert Type]
- Date of Policy Issue: [Insert Date]

Please let me know if there are any forms or specific identification I need to provide to expedite this request. I appreciate your assistance in this matter and look forward to your prompt response.

Thank you for your attention to this request.

Sincerely,

[Your Name]