

Beneficiary Allocation Update Letter

Date: [Insert Date]

To: [Recipient Name]

[Recipient Address]

[City, State, Zip Code]

Dear [Recipient Name],

We are writing to inform you about the recent updates regarding the allocation of beneficiaries for your investment assets.

As per your request, we have made the following changes to the beneficiary allocations:

- **Asset Name 1:** [New Beneficiary Name] - [Percentage/Amount]
- **Asset Name 2:** [New Beneficiary Name] - [Percentage/Amount]
- **Asset Name 3:** [New Beneficiary Name] - [Percentage/Amount]

Please review the updated beneficiary allocations carefully. If these changes are correct, no further action is required. If you wish to make additional modifications or have any questions, please do not hesitate to contact us at [Contact Information].

Thank you for your attention to this matter.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Contact Information]