

Beneficiary Assignment Update

Date: _____

To Whom It May Concern,

I am writing to formally update the beneficiary assignment for my investment portfolio. Please find the updated beneficiary details below:

Beneficiary Information

Primary Beneficiary:

- Name: _____
- Relationship: _____
- Date of Birth: _____
- Contact Information: _____

Contingent Beneficiary:

- Name: _____
- Relationship: _____
- Date of Birth: _____
- Contact Information: _____

Please update your records to reflect this change. Should you require any additional information or documentation, do not hesitate to contact me.

Thank you for your attention to this matter.

Sincerely,

Name: _____

Address: _____

Phone Number: _____

Email: _____