

# Beneficiary Change Notice

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email]

[Your Phone Number]

To: [Financial Institution Name]

[Institution Address]

[City, State, Zip Code]

Dear [Financial Institution Contact/Department],

I am writing to formally request a change of beneficiary for my investment account with account number [Insert Account Number].

Effective immediately, I would like to designate the following as my new beneficiary:

- Name: [New Beneficiary Name]
- Date of Birth: [New Beneficiary DOB]
- Social Security Number: [New Beneficiary SSN]

Please update your records accordingly and send me a confirmation of this change at your earliest convenience. If you have any questions, feel free to contact me at [Your Phone Number] or [Your Email].

Thank you for your attention to this matter.

Sincerely,

[Your Signature (if sending a hard copy)]

[Your Printed Name]