

Change of Beneficiary Request

Your Name: [Your Name]

Your Address: [Your Address]

City, State, Zip Code: [City, State, Zip Code]

Email: [Your Email]

Phone Number: [Your Phone Number]

Date: [Date]

To: [Investment Company Name]

Address: [Investment Company Address]

City, State, Zip Code: [City, State, Zip Code]

Subject: Change of Beneficiary on Investment Account

Dear [Investment Company Representative's Name],

I am writing to formally request a change of beneficiary on my investment account, which is held under my name.

Account Information:

Account Number: [Your Account Number]

Current Beneficiary Information:

Name: [Current Beneficiary Name]

Relationship: [Current Beneficiary Relationship]

New Beneficiary Information:

Name: [New Beneficiary Name]

Relationship: [New Beneficiary Relationship]

Address: [New Beneficiary Address]

City, State, Zip Code: [New Beneficiary City, State, Zip Code]

Please process this request at your earliest convenience. If you require any additional information or documentation, do not hesitate to contact me at the phone number or email provided above.

Thank you for your prompt attention to this matter.

Sincerely,

[Your Name]