

Investment Account Beneficiary Amendment

Date: **[Insert Date]**

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

To: [Financial Institution's Name]

[Institution's Address]

[City, State, Zip Code]

Dear [Recipient's Name or "To Whom It May Concern"],

I am writing to formally request an amendment to the beneficiary designation of my investment account held with your institution. Below are the details of my account:

Account Holder Name: **[Your Name]**

Account Number: **[Your Account Number]**

Current Beneficiary Information:

Beneficiary Name: **[Current Beneficiary Name]**

Relationship: **[Relationship to Current Beneficiary]**

New Beneficiary Information:

Beneficiary Name: **[New Beneficiary Name]**

Relationship: **[Relationship to New Beneficiary]**

I understand that this amendment will supersede any previous beneficiary designations I have made. Please process this request at your earliest convenience.

If you require any further information or documentation to complete this amendment, please feel free to contact me.

Thank you for your attention to this matter.

Sincerely,

[Your Signature (if sending a hard copy)]

[Your Printed Name]