

# Investment Account Beneficiary Designation Request

Date: [Insert Date]

[Your Name]  
[Your Address]  
[City, State, Zip Code]  
[Your Email Address]  
[Your Phone Number]

[Investment Firm Name]  
[Firm Address]  
[City, State, Zip Code]

Dear [Investment Firm's Contact Name],

I am writing to formally request the designation of a beneficiary for my investment account with your firm. Below are my account details:

Account Number: [Insert Account Number]

I wish to designate the following individual(s) as the beneficiary(ies) for my investment account:

- Beneficiary Name: [Insert Name]  
Relationship: [Insert Relationship]  
Date of Birth: [Insert Date of Birth]
- Beneficiary Name: [Insert Name]  
Relationship: [Insert Relationship]  
Date of Birth: [Insert Date of Birth]

Please confirm receipt of this beneficiary designation request and let me know if you require any additional information or documentation.

Thank you for your assistance.

Sincerely,

[Your Signature (if sending a hard copy)]  
[Your Printed Name]