

# Notice of Beneficiary Update

Date: [Insert Date]

To: [Recipient's Name]

[Recipient's Address]

[City, State, Zip Code]

Dear [Recipient's Name],

We are writing to inform you that your beneficiary designation for your investment holdings has been updated. Please find the details below:

## Updated Beneficiary Information

- **Beneficiary Name:** [New Beneficiary Name]
- **Relationship:** [Relationship to You]
- **Date of Birth:** [Date of Birth]
- **Percentage of Holdings:** [Percentage]

If you have any questions or need further assistance, please do not hesitate to contact us at [Contact Information].

Thank you for your attention to this matter.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Company Address]

[City, State, Zip Code]

[Contact Information]