

# Letter to Revise Beneficiary Details

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Investment Firm Name]

[Firm Address]

[City, State, Zip Code]

Dear [Investment Firm Representative's Name],

I am writing to formally request a revision to the beneficiary details associated with my investment account, account number [Insert Account Number].

Previously, the beneficiaries listed were as follows:

- [Beneficiary Name 1] - [Relationship]
- [Beneficiary Name 2] - [Relationship]

I would like to revise the beneficiary details to the following:

- [Revised Beneficiary Name 1] - [Relationship]
- [Revised Beneficiary Name 2] - [Relationship]

Please let me know if you require any further information or documentation to process this request. I appreciate your prompt attention to this matter.

Thank you for your assistance.

Sincerely,

[Your Signature (if sending a hard copy)]

[Your Printed Name]