

Updated Beneficiary Information

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Email Address]

[Phone Number]

[Investment Company Name]

[Company Address]

[City, State, Zip Code]

Dear [Investment Company Contact Name],

I am writing to inform you of an update to my beneficiary information for my investments with [Investment Company Name]. Please find the details of the new beneficiary information below:

Beneficiary Information

Name: [New Beneficiary Name]

Relationship: [Relationship to You]

Date of Birth: [Date of Birth]

SSN: [Social Security Number]

Address: [Beneficiary Address]

Should you require any further documentation or information, please feel free to contact me at the information provided above.

Thank you for your attention to this matter.

Sincerely,

[Your Signature]

[Your Printed Name]