

# Beneficiary Change Request

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, Zip Code]

[Your Email]

[Your Phone Number]

To Whom It May Concern,

I am writing to formally request a change in the beneficiary for my college savings plan. Below are the details of my current account and the new beneficiary information.

## Current Beneficiary Information:

Name: [Current Beneficiary Name]

Relationship: [Current Beneficiary Relationship]

Account Number: [Your Account Number]

## New Beneficiary Information:

Name: [New Beneficiary Name]

Relationship: [New Beneficiary Relationship]

Date of Birth: [New Beneficiary Date of Birth]

Thank you for your attention to this matter. Please let me know if you require any additional information or documentation to process this request.

Sincerely,

[Your Name]