

# Beneficiary Designation for Tax-Deferred Pension Plan

Date: [Insert Date]

[Your Name]

[Your Address]

[City, State, ZIP Code]

[Email Address]

[Phone Number]

[Pension Plan Administrator's Name]

[Pension Plan Administrator's Address]

[City, State, ZIP Code]

## **Subject: Tax-Deferred Pension Plan Beneficiary Designation**

Dear [Pension Plan Administrator's Name],

I am writing to formally designate my beneficiaries for my tax-deferred pension plan [Account Number or Plan Name], in accordance with the plan's requirements.

### **Beneficiary Information:**

#### **Primary Beneficiary:**

Name: [Beneficiary Name]

Date of Birth: [DOB]

Relationship: [Relationship to you]

Percentage: [Percentage of benefits]

#### **Contingent Beneficiary:**

Name: [Contingent Beneficiary Name]

Date of Birth: [DOB]

Relationship: [Relationship to you]

Percentage: [Percentage of benefits]

I understand that this beneficiary designation supersedes any prior designations and will remain in effect until I provide written notice of any changes. Please update your records accordingly.

Thank you for your attention to this matter.

Sincerely,

[Your Name]

[Your Signature (if sending a hard copy)]