

[Your Name]
[Your Address]
[Your Phone Number]
[Your Email Address]

[Date]

[Name of Financial Institution]
[Department Name, e.g., Estate Department]
[Address of Institution]

RE: Formal Dispute Regarding Beneficiary Designation

Deceased Account Holder: [Name of Deceased]

Account Number: [Account Number]

Date of Death: [Date]

To Whom It May Concern,

I am writing to formally dispute the current beneficiary designation recognized by [Name of Financial Institution] for the above-referenced account. I am an interested party to this estate in my capacity as [state your relationship, e.g., Executor, Legal Heir, or Named Beneficiary under a previous/valid designation].

I believe the current beneficiary recognition is improper for the following reason(s):

- [State reason: e.g., The designation was made under undue influence.]
- [State reason: e.g., The designation was made when the account holder lacked mental capacity.]
- [State reason: e.g., The designation form was not properly executed or witnessed.]
- [State reason: e.g., A more recent valid legal document, such as a court order or updated Will, supersedes this designation.]

I have attached the following supporting documentation for your review: [List documents, e.g., Death Certificate, Power of Attorney records, medical records, or a copy of the Will].

I request that [Name of Financial Institution] immediately place a hold on the distribution of funds from this account until this dispute is legally resolved. Please provide a written response confirming that this account has been flagged and that no assets will be transferred to the contested beneficiary during this period.

Thank you for your prompt attention to this matter. I look forward to your response within [Number] business days.

Sincerely,

[Your Signature]

[Your Printed Name]