

[Date]

[Client Name]

[Address Line 1]

[Address Line 2]

Re: Confirmation of Beneficiary Amendment - Account Number: [Account Number]

Dear [Client Name],

This letter is to confirm that we have successfully processed your request to amend the beneficiary designations for your investment account referenced above.

The updated beneficiary information on file is as follows:

- [Primary Beneficiary Name] - [Percentage]%
- [Primary Beneficiary Name] - [Percentage]%
- [Contingent Beneficiary Name] - [Percentage]%

Please review these details carefully to ensure they accurately reflect your wishes. It is important to keep your beneficiary designations current to ensure the efficient transfer of assets in accordance with your estate plan.

If you have any questions regarding these changes or if any corrections are needed, please contact your Financial Advisor or our Client Service Department at [Phone Number].

Thank you for choosing [Financial Institution Name].

Sincerely,

[Sender Name]

[Title]

[Financial Institution Name]