

[Date]

[Customer Name]

[Address Line 1]

[Address Line 2]

[City, State, Zip Code]

Re: Confirmation of Beneficiary Designation Change

Account Number: [Account Number]

Dear [Customer Name],

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

The updated information is now active in our records. Your primary and contingent beneficiaries are currently listed as follows:

- **Primary Beneficiary(ies):** [Name(s) and Percentage(s)]
- **Contingent Beneficiary(ies):** [Name(s) and Percentage(s)]

We recommend that you keep a copy of this confirmation for your personal records. It is important to review your beneficiary designations periodically, especially following major life events such as marriage, birth, or divorce.

If you have any questions or if any of the information listed above is incorrect, please contact our customer service department at [Phone Number] or visit our website at [Website URL].

Thank you for choosing [Financial Institution Name].

Sincerely,

[Sender Name/Department]

[Financial Institution Name]