

[Date]

[Your Full Name]

[Your Address]

[City, State, Zip Code]

[Phone Number]

[Financial Institution/Company Name]

[Department Name]

[Address]

[City, State, Zip Code]

**Subject: Update of Beneficiary Designation for Account(s): [Account Number(s)]**

Dear [Contact Person or Customer Service Department],

I am writing to formally update the beneficiary designations for my account(s) held with your institution to ensure my legacy is secured according to my current wishes.

Please remove all prior beneficiary designations and replace them with the following:

**Primary Beneficiary:**

- Full Name: [Name]
- Relationship: [Relationship]
- Social Security Number (if required): [SSN]
- Date of Birth: [DOB]
- Percentage Share: [Percentage]%

**Contingent Beneficiary:**

- Full Name: [Name]
- Relationship: [Relationship]
- Social Security Number (if required): [SSN]
- Date of Birth: [DOB]
- Percentage Share: [Percentage]%

Please process these changes immediately. I request a written confirmation or an updated account statement reflecting these designations for my permanent records.

If there are specific forms required to finalize this update, please send them to my address listed above or contact me at [Phone Number].

Thank you for your assistance in securing my estate plan.

Sincerely,

[Signature]

[Your Printed Name]