[Your Name]
[Your Address]
[City, State, Zip Code]
[Phone Number]
[Email Address]

[Date]

[Financial Institution Name]
[Department Name, if applicable]
[Address]
[City, State, Zip Code]

RE: Update of Beneficiary Designations for Estate Accounts

To Whom It May Concern,

I am writing to you in my capacity as the court-appointed Estate Representative (Executor/Administrator) for the Estate of [Deceased's Full Name], who passed away on [Date of Death].

Regarding Account Number(s): [List Account Numbers]

Pursuant to the authority granted to me by the attached Letters Testamentary / Letters of Administration, I am formally requesting an update to the beneficiary designations for the aforementioned account(s). Please find the updated beneficiary information provided below:

Primary Beneficiary:
Name: [Full Name]
Relationship to Deceased: [Relationship]
SSN/Tax ID: [Number]
Date of Birth: [Date]
Address: [Address]

Contingent Beneficiary:
Name: [Full Name]
Relationship to Deceased: [Relationship]
SSN/Tax ID: [Number]
Date of Birth: [Date]
Address: [Address]

Enclosed with this letter, please find the following supporting documentation:
- Certified Copy of the Death Certificate
- Certified Copy of my Letters Testamentary / Letters of Administration
- A copy of my government-issued photo ID

Please confirm in writing once these updates have been processed. If your institution requires a specific internal form to complete this request, please send it to my address listed above or contact me via phone at [Phone Number].

Thank you for your prompt attention to this matter.

Sincerely,

[Your Signature]

[Your Printed Name]
Representative for the Estate of [Deceased's Name]