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

[Date]

[Financial Institution or Company Name]
[Department Name]
[Address]
[City, State, Zip Code]

RE: Update of Beneficiary Designations for Account Number: [Your Account Number]

To Whom It May Concern,

I am writing to formally request an update to the beneficiary designations for the above-referenced account. Please remove all previously named beneficiaries and replace them with the following individuals:

Primary Beneficiary 1:
Name: [Full Name]
Relationship: [Relationship]
Date of Birth: [DOB]
Social Security Number: [SSN]
Allocation: [Percentage]%

Primary Beneficiary 2:
Name: [Full Name]
Relationship: [Relationship]
Date of Birth: [DOB]
Social Security Number: [SSN]
Allocation: [Percentage]%

Contingent Beneficiary (Optional):
Name: [Full Name]
Relationship: [Relationship]
Date of Birth: [DOB]
Social Security Number: [SSN]
Allocation: [Percentage]%

Please update your records to reflect these changes immediately. I request a written confirmation or an updated statement showing these changes once they have been processed.

If there are specific forms required to finalize this request, please send them to my address listed above or contact me via phone.

Sincerely,

[Signature]

[Your Printed Name]