**Sample Change of Beneficiary Form Letter**

September 25, 2016

Vanguard

1234 Main Street

Anytown, CA 12345

Re: Change of Beneficiary

IRA Account No. 12-3456-7890

To Whom It May Concern:

This letter is regarding the beneficiary of the above-named account. I would like to change the primary beneficiary to: Ellen Smith, my wife.

Please send me a confirmation letter confirming the change, and, if necessary, your institution’s form in order to make this change.

Please contact me at the following address if you have any questions:

JOHN R. SMITH

123 SAMPLE DRIVE

SANTA ROSA, CA 95404

(707) 123-4567

johnsmith@email.com

Thank you for your assistance in this matter.

Sincerely,

John R. Smith