

Name and Address of Financial Institution:

Date: _____

Dear _____:

I am writing regarding account number (s) _____. Please be advised that I wish to change the beneficiary designations on this account as follows:

Primary beneficiary (ies): _____

Contingent beneficiary (ies): _____

Secondly, I authorize you to send the beneficiary information, including name of non profit organization, and dollar amount (if the dollar amount intended for the non profit organization is not available, please provide the most recent valuation of the account in its entirety below, and the beneficiary percentage allocated to the non profit organization) identified as the beneficiary gift amount to the Future Needs Funding Program at the following address:

The value of the above mentioned account as of the date of this letter, or the most recent month end reporting date, for purposes of computing the actual dollar amount allocated to each beneficiary:
\$_____.

Thank you for your immediate processing of this request.

Sincerely,