

Do not attempt the life insurance notification process if you are represented by an attorney unless you have specifically agreed with your attorney that this is your responsibility. If your attorney has not prepared a life insurance letter on your behalf you should inquire about it to your attorney immediately.

If you are not represented by an attorney this sample letter provides a format to prepare a life insurance letter. You are responsible for drafting your own letter. The provisions contained herein need to be modified to your particular situation based on the terms of your judgment. This sample letter cannot be used “as-is.”

This sample letter only applies to judgments entered in the state of Oregon.

BY FIRST CLASS MAIL TO:

[Insurance Company]
[Address 1]
[Address 2]

Re: Your Insured: [Name of person who is insured]
Policy No: [Policy Number]
[Case Name]
[County] County Circuit Court No.: [Case Number]

Dear Sir or Madam:

Enclosed is a certified copy of a General Judgment of [Dissolution of Marriage] OR [Custody] involving your insured, [Name of Insured]. Please refer to paragraph [X] on page [Y] of the judgment. As you can see, [Name of Insured] is ordered by the court to maintain the above-referenced policy in full force and effect naming [Name of Beneficiary] as the [primary] OR [trustee] beneficiary in the amount of \$_____.

Pursuant to ORS 107.820(6), I hereby request that you confirm that [Name of Insured] is listed as the primary beneficiary of the policy in the designated amount (by name, not simply as spouse). In addition, the statute requires that you notify [Name of Beneficiary] whenever [Name of Insured] takes any action to change the beneficiary, reduce the benefits, or when premium payments have not been made. You must honor this request or risk suffering legal penalties or possible damages for your failure to do so.

Until further notice, any notices you are required to give should be sent to the following address:

[Name of Beneficiary]
[Beneficiary Address 1]
[Beneficiary Address 2]

Thank you in advance for your cooperation and assistance. Please contact me if you have any questions or concerns. I can be reached at the above address or at [Phone Number].

Sincerely,

[Name of Beneficiary]

SAMPLE LETTER