

# Beneficiary review checklist

REVIEW. UPDATE. REPEAT.



INVESTMENTS

# Sometimes, life comes at you fast.

And, it can change your financial priorities in the blink of an eye. Revisiting your beneficiaries—especially after major life events—is the best way to make sure that you are taking care of those most important to you.

Life Insurance	Primary Beneficiary	Relation	Contingent Beneficiary	Relation
<b>My Policy</b>				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
<b>Spouse</b>				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
<b>Child</b>				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
<b>Child</b>				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
Individual Retirement Account	Primary Beneficiary	Relation	Contingent Beneficiary	Relation
<b>IRA #1</b>				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	
<b>IRA #2</b>				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	
<b>Spousal IRA</b>				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	

**Roth IRA**

Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	

<b>Retirement Plans</b>	<b>Primary Beneficiary</b>	<b>Relation</b>	<b>Contingent Beneficiary</b>	<b>Relation</b>
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**401(k) Plan**

Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	

**403(b) Plan**

Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	

**457 Plan**

Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	

**Keogh Plan**

Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	

**SEP IRA Plan**

Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	

**Defined Benefit/Pension Plan**

Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	

<b>Other Plans and Contracts</b>	<b>Primary Beneficiary</b>	<b>Relation</b>	<b>Contingent Beneficiary</b>	<b>Relation</b>
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**Deferred Compensation Plan**

Employer	Name		Name	
	Address		Address	
	Phone		Phone	

Other Plans and Contracts	Primary Beneficiary	Relation	Contingent Beneficiary	Relation
<b>Annuity Contract</b>				
Issuing Company	Name		Name	
Contract #	Address		Address	
	Phone		Phone	
<b>Disability Policy</b>				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
<b>529 Plan</b>				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	
<b>Coverdell Education Savings Account</b>				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	

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**For more information**  
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