Beneficiary Designation Checklist

Use this form to help review who you have named as your beneficiary(ies) on all your accounts and keep them up to date. As important life events occur (such as marriage, divorce, birth of a child or grandchild, or passing of a loved one) these beneficiary designations should be updated. This is of primary importance as upon your death, accounts such as IRAs, 401(k)s, annuity contracts, and life insurance typically avoid probate and are passed to whoever is listed on the account's beneficiary designation form, not by the provisions of a will or trust.

NON-PROBATE ASSETS

Retirement Accounts

TYPE OF ACCOUNT (IRA, 401(K), 403(B), ETC.) & ACCOUNT NUMBER	CUSTODIAN	BENEFICIARY	LAST UPDATED

Non-Qualified Annuities

ACCOUNT NUMBER	COMPANY	BENEFICIARY	LAST UPDATED

Life Insurance

ACCOUNT NUMBER	COMPANY	BENEFICIARY	LAST UPDATED

OTHER ASSETS

Checking and Savings Accounts

ACCOUNT NUMBER	COMPANY

Brokerage Accounts

ACCOUNT NUMBER	COMPANY

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IMPORTANT DOCUMENTS

Will

LOCATION OF DOCUMENT	LAST UPDATED

Trusts

NAME	LOCATION OF DOCUMENT	LAST UPDATED

Health Care Proxy

LOCATION OF DOCUMENT	LAST UPDATED

Power of Attorney

LOCATION OF DOCUMENT	LAST UPDATED

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