BENEFICIARY REVIEW CHECKLIST

Regularly reviewing beneficiary designations is an important part of your financial plan.

Making sure your beneficiary designations are accurate and up to date can help make asset transfer a smooth and easy process for your loved ones, while ensuring distribution is completed as intended. Working with your financial advisor to review account designations can help to answer any questions you may have and avoid costly mistakes.

UPDATING FOR LIFE EVENTS

Remember to review beneficiary designations after major life events to avoid transfer of assets to unintended beneficiaries. Examples include:

☐ BIRTH ☐ DEATH ☐ MARRIAGE ☐ DIVORCE ☐ JOB CHANGE ☐ INHERITANCE

NAME ______________________________________ DATE ________________

Account	Description	Location	Primary Beneficiary	Contingent Beneficiary	Last Updated
401(k)					
IRA 1					
IRA 2					
Life insurance policy 1					
Life insurance policy 2					
Annuity 1					
Annuity 2					
Checking account 1					
Checking account 2					
Bank savings/deposits					
CDs					
Trust 1					
Trust 2					
Other					

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