



BENEFICIARY DESIGNATIONS

YOUR NAME

DATE

YOUR INSURANCE POLICIES

Company Agent Face Amount: \$

Primary Beneficiary

Secondary Beneficiary

Company Agent Face Amount: \$

Primary Beneficiary

Secondary Beneficiary

YOUR ANNUITIES

Company Agent Face Amount: \$

Primary Beneficiary

Secondary Beneficiary

Company Agent Face Amount: \$

Primary Beneficiary

Secondary Beneficiary

YOUR RETIREMENT ACCOUNTS

Company Type of Plan: ☐ IRA ☐ Roth IRA ☐ 401(k) ☐ Keogh ☐ SEP ☐ Other

Beneficiary(ies) upon your death (1 (2 Current Value: \$

Company Type of Plan: ☐ IRA ☐ Roth IRA ☐ 401(k) ☐ Keogh ☐ SEP ☐ Other

Beneficiary(ies) upon your death (1 (2 Current Value: \$

YOUR ESTATE PLANNING DOCUMENTS

☐ Will ☐ Trust Attorney Name Phone Beneficiary(ies)

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