



# 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)

Will  Trust Attorney Name

Phone

Beneficiary(ies)