

# MY BENEFICIARIES

## A Checklist for Reviewing Beneficiary Information



It's very important to review your beneficiary designations regularly. Major life events—such as births, deaths, marriages, divorces, and inheritances—are perfect times to review beneficiary information. By keeping this list accurate and up to date, you can be sure that your hard-earned assets will be distributed according to your wishes.

Begin by listing all the financial accounts you and your family own. Be sure to write down all types, including 401(k), IRA, life insurance, annuity, bank accounts, trusts, joint brokerage (WROS or TIC), and any others. Once you have listed them all, complete the rest of the information in the columns to the right.

Next, review the list with your Financial Advisor to ensure that beneficiaries and account titling are appropriate for your estate planning wishes. Opal will also help to make sure that you're set up to avoid any unintended costly errors and that your heirs will receive maximum benefit.

Name: \_\_\_\_\_ Today's Date: \_\_\_\_\_

Account Type	Account Owner	Description	Location	Beneficiaries <i>(primary and contingent)</i>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
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