TOOL 6

Beneficiary & Account Review

Do not place account numbers or passwords here if this workbook could be seen by others.

ACCOUNT / POLICY TYPE	INSTITUTION	PRIMARY BENEFICIARY	CONTINGENT BENEFICIARY	REVIEW?
Retirement account				☐
Retirement account				☐
Life insurance				☐
Life insurance				☐
Bank / POD account				☐
Brokerage / TOD account				☐
Annuity				☐
Other				☐

QUESTIONS TO ASK BEFORE CHANGING ANY BENEFICIARY DESIGNATION:

- ☐ Does this designation still match the estate plan?
- ☐ Could naming the trust create tax or administrative consequences?
- ☐ Has a beneficiary died, divorced, remarried, or become unable to manage funds?
- ☐ Should contingent beneficiaries be added or updated?