

BENEFICIARY REVIEW CHECKLIST



Confirm each account below names the right person, that a contingent is in place, and that the designation fits your trust. Note where combining accounts or rolling over an old plan makes sense.

INSTITUTION / CUSTODIAN	PRIMARY BENEFICIARY	CONTINGENT BENEFICIARY	TRUST ALIGNED?	DATE LAST REVIEWED	ACTION NEEDED
IRAS — TRADITIONAL					
IRAS — ROTH					
401(K) / 403(B) — INCLUDE ACCOUNTS FROM FORMER EMPLOYERS					
CHECKING / SAVINGS ACCOUNTS					

INSTITUTION / CUSTODIAN	PRIMARY BENEFICIARY	CONTINGENT BENEFICIARY	TRUST ALIGNED?	DATE LAST REVIEWED	ACTION NEEDED
LIFE INSURANCE — PERSONAL POLICIES					
LIFE INSURANCE — EMPLOYER / GROUP POLICIES					
LONG-TERM CARE INSURANCE					
ANNUITIES					
BUSINESS POLICIES (IF APPLICABLE)					