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Current Beneficiaries List

This worksheet is intended to be used as a way of documenting who your beneficiaries are on certain assets that allow you to name a beneficiary. When you name a beneficiary, your account is transferred upon your death to the person you name. You may have to call the financial institution where your account is located to confirm 1) whether you have designated a beneficiary, and 2) is the beneficiary you named the correct person or does it need to be updated.

I. Retirement Assets: Current Beneficiaries		
Retirement Plan	Owner	Beneficiaries
		Primary: Secondary:
		Primary: Secondary:
		Primary: Secondary:

II. Life Insurance: Current Beneficiaries		
Life Insurance Policy	Owner	Beneficiaries
		Primary:

		Secondary:
		Primary: Secondary:
		Primary: Secondary:

III. Any Other Payable-on-Death Accounts (Bank Accounts, Bonds, Titles to Vehicles)

Account	Owner	Beneficiaries
		Primary: Secondary:
		Primary: Secondary:
		Primary: Secondary:
		Primary: Secondary: