Beneficiary Review & Checklist Worksheet

W&S Financial Group Distributors
A member of Western & Southern Financial Group

Make sure your beneficiary designations are up to date so assets pass as you intend

Mistakes or omissions on your financial account beneficiary forms can lead to unnecessary hassle, cost or hardship for those you intend to benefit.

Take a few moments today to make sure you name beneficiaries to all of your financial accounts and update as necessary based on your recent life events or circumstances. This may help you feel prepared knowing that your wishes will be fulfilled, and your loved ones will know that you cared enough to make sure your assets transfer smoothly.

Use this worksheet and checklist to help you organize your information. Then, make sure the official beneficiary forms for each of your accounts are complete and reflect your needs and wishes. Completed forms must be sent to the firms where the accounts are held.

Account/Type	Value	Firm	Primary Beneficiaries/Relationship	Secondary Beneficiaries/Relationship	Last Updated
			1.	1.	
			2.	2.	
			1.	1.	
			2.	2.	
			1.	1.	
			2.	2.	
			1.	1.	
			2.	2.	
			1.	1.	
			2.	2.	
			1.	1.	
			2.	2.	
			1.	1.	
			2.	2.	
			1.	1.	
			2.	2.	

If you need additional room, it might be time to consolidate. Your financial representative can help you simplify your accounts to best meet your needs.

Review and complete the Life Event Checklist on the back of this sheet.

Have any of the following life events happened to you in the past 12 months?

	Check All That Apply — If you have one or more boxes checked, follow up with your financial representative.		
	Marriage		Divorce
	Remarriage		New insurance policy
	New job		Rollover
	Birth of child		Adoption
	Birth of grandchild		Illness or incapacitation of beneficiary
	Child turns 18		Establishment of a trust
	Death of a beneficiary		Inheritance
	Marriage of adult child		Change in company's retirement plan or pension
	Divorce of adult child		Change in job status or income
	Recently retired		Changes in health or health of spouse
	Moved to a different state or country		Took on new caregiving duties

Don't wait until it's too late

Now is the time to ensure your beneficiary information is up to date and reflective of your wishes. Make a commitment to review this worksheet at least annually, and especially when you experience one of the life events listed above.

Contact your financial representative if you have questions or need assistance with beneficiary designations.