Beneficiary Designations

Helping smart people make smart financial decisions

INCLUDE A CURRENT STATEMENT LISTING YOUR BENEFICIARIES FROM EACH COMPANY.

Beneficiary designations are required on accounts such as:

- *Employer retirement accounts (401k), 403(b), 457(b),etc.)*
- *Other retirement accounts (IRA, Roth IRA, Simple or SEP IRA)*
- *Annuities*
- *Life insurance policies*
- *Savings accounts*

Be sure to have both primary and secondary (or contingent) beneficiary information.

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