

Beneficiary-review worksheet

Use one sheet per account or policy. Record what is currently on file; do not use this sheet to make a designation. Account numbers are not needed.

Institution and type of asset

Current owner

Primary beneficiary and shares

Backup beneficiary and shares

Your intended result

Date confirmed with the institution

Question or next action

Write "unknown - confirm with provider" when needed. Keep completed sheets with your private planning records. This worksheet does not change a beneficiary, create a trust, or direct payment.