Advisor Advancement Institute

Beneficiary review checklist

REVIEW. UPDATE. REPEAT.

New York Life Investments

Sometimes, life comes at you fast.

And, it can change your financial priorities in the blink of an eye. Revisiting your beneficiaries—especially after major life events—is the best way to make sure that you are taking care of those most important to you.

Life Insurance	Primary Beneficiary	Relation	Contingent Beneficiary	Relation
My Policy				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
Spouse				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
Child				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
Child				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	

Individual Retirement Account	Primary Beneficiary	Relation	Contingent Beneficiary	Relation
IRA #1				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	
IRA #2				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	
Spousal IRA				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	

Roth IRA				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	

Retirement Plans	Primary Beneficiary	Relation	Contingent Beneficiary	Relation
401(k) Plan				
Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	
403(b) Plan				
Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	
457 Plan				
Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	
Keogh Plan				
Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	
SEP IRA Plan				
Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	
Defined Benefit/Pension Plan				
Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	

Other Plans and Contracts	Primary Beneficiary	Relation	Contingent Beneficiary	Relation
Deferred Compensation Plan				
Employer	Name		Name	
	Address		Address	
	Phone		Phone	

Other Plans and Contracts	Primary Beneficiary	Relation	Contingent Beneficiary	Relation
Annuity Contract				
Issuing Company	Name		Name	
Contract #	Address		Address	
	Phone		Phone	
Disability Policy				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
529 Plan				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	
Coverdell Education Savings Account				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	

The information contained herein is general in nature and is provided solely for educational and informational purposes. New York Life Investments does not provide legal, accounting or tax advice. You should obtain advice specific to your circumstances from your own legal, accounting and tax advisors.

For more information
morethaninvesting.com

NEW YORK LIFE INVESTMENTS