

Beneficiary and Personal Representative Designations

Note:

Prepare a form for *each* person in your household with beneficiaries and personal representatives listed on important financial and legal documents. Review these documents regularly for needed changes.

Name _____

Date of Preparation/Review _____

Legal Documents

Living Will

Date of preparation or last review and/or revision _____

Location of original living will _____

Location of copies of living will _____

Name(s) of health care proxy(ies) _____

Name(s) of contingent health care proxy(ies) _____

Note: A *health care proxy* may also be called a *health care representative* or a *health care surrogate*.

Power of Attorney

Type of power of attorney (e.g., durable power of attorney) _____

Date of preparation or last review and/or revision _____

Location of original power of attorney document _____

Location of copies of power of attorney document _____

Name(s) of attorney in fact _____

Name(s) of contingent attorney in fact _____

Will

Date of preparation or last review and/or revision _____

Location of original will _____

Location of copies of will _____

Name(s) of executor(s) _____

Name(s) of contingent executor(s) _____

Financial Documents

Life Insurance

Name of insurance company _____

Policy number _____

Name of policy owner _____

Name of the insured _____

Name(s) of beneficiary(ies) _____

Name(s) of contingent beneficiary(ies) _____

Name of insurance company _____
Policy number _____
Name of policy owner _____
Name of the insured _____
Name(s) of beneficiary(ies) _____
Name(s) of contingent beneficiary(ies) _____

Name of insurance company _____
Policy number _____
Name of policy owner _____
Name of the insured _____
Name(s) of beneficiary(ies) _____
Name(s) of contingent beneficiary(ies) _____

Tax-Deferred Retirement Savings Accounts

Type of account (e.g., IRA, 401(k), SEP, annuity, etc.) _____
Account custodian (e.g., bank, brokerage firm, etc.) _____
Account number _____
Name(s) of beneficiary(ies) _____
Name(s) of contingent beneficiary(ies) _____

Type of account (e.g., IRA, 401(k), SEP, annuity, etc.) _____
Account custodian (e.g., bank, brokerage firm, etc.) _____
Account number _____
Name(s) of beneficiary(ies) _____
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Account number _____
Name(s) of beneficiary(ies) _____
Name(s) of contingent beneficiary(ies) _____

Type of account (e.g., IRA, 401(k), SEP, annuity, etc.) _____
Account custodian (e.g., bank, brokerage firm, etc.) _____
Account number _____
Name(s) of beneficiary(ies) _____
Name(s) of contingent beneficiary(ies) _____

Other Financial Assets with Beneficiary, Co-ownership, or Survivorship Designations

Type of account (e.g., bank account, CD, U.S. savings bonds, etc.)_____

Account custodian (e.g., bank, U.S. Treasury)_____

Account number_____

Name(s) of owner or co-owners_____

Name(s) of beneficiary(ies), if any_____

Name(s) of contingent beneficiary(ies), if any_____

Type of account (e.g., bank account, CD, U.S. savings bonds, etc.)_____

Account custodian (e.g., bank, U.S. Treasury)_____

Account number_____

Name(s) of owner or co-owners_____

Name(s) of beneficiary(ies), if any_____

Name(s) of contingent beneficiary(ies), if any_____

Type of account (e.g., bank account, CD, U.S. savings bonds, etc.)_____

Account custodian (e.g., bank, U.S. Treasury)_____

Account number_____

Name(s) of owner or co-owners_____

Name(s) of beneficiary(ies), if any_____

Name(s) of contingent beneficiary(ies), if any_____

Type of account (e.g., bank account, CD, U.S. savings bonds, etc.)_____

Account custodian (e.g., bank, U.S. Treasury)_____

Account number_____

Name(s) of owner or co-owners_____

Name(s) of beneficiary(ies), if any_____

Name(s) of contingent beneficiary(ies), if any_____

Type of account (e.g., bank account, CD, U.S. savings bonds, etc.)_____

Account custodian (e.g., bank, U.S. Treasury)_____

Account number_____

Name(s) of owner or co-owners_____

Name(s) of beneficiary(ies), if any_____

Name(s) of contingent beneficiary(ies), if any_____

Miscellaneous Notes

