

# 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) \_\_\_\_\_  
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) \_\_\_\_\_

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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) \_\_\_\_\_  
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**

