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)_________________________________________________

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**

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