



INVESTMENTS



ADVISOR ADVANCEMENT INSTITUTE

Beneficiary review checklist

Review. Update. Repeat.

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 Co.	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
Spouse				
Issuing Co.	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
Child				
Issuing Co.	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
Child				
Issuing Co.	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	

Individual Retirement Account		Primary Beneficiary	Relation	Contingent Beneficiary	Relation
Roth IRA					
Company	Name		Name		
Account #	Address		Address		
	Phone		Phone		
Retirement Plan		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		
Account #	Address		Address		
	Phone		Phone		

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



The Advisor Advancement Institute is a program within New York Life Investments. "New York Life Investments" is both a service mark, and the common trade name, of certain investment advisors affiliated with New York Life Insurance Company.

NOT FDIC INSURED | **MAY LOSE VALUE** | **NO BANK GUARANTEE**