

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)_____

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)_____

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