

Beneficiary Reviewer

Use this worksheet to ensure the correct beneficiary designations are made on your retirement assets. List all potential beneficiaries on all of your documents with all of their contact information. Replicate this document if there are additional beneficiaries to be added.

RETIREMENT ASSET #1		
ACCOUNT		
Primary Beneficiary:		Percentage:
Address:	Phone:	
Primary Beneficiary:		Percentage:
Address:	Phone:	
Contingent Beneficiary:		Percentage:
Address:	Phone:	
Contingent Beneficiary:		Percentage:
Address:	Phone:	
Contingent Beneficiary:		Percentage:
Address:	Phone:	

RETIREMENT ASSET #2		
ACCOUNT		
Primary Beneficiary:		Percentage:
Address:	Phone:	
Primary Beneficiary:		Percentage:
Address:	Phone:	
Contingent Beneficiary:		Percentage:
Address:	Phone:	
Contingent Beneficiary:		Percentage:
Address:	Phone:	
Contingent Beneficiary:		Percentage:
Address:	Phone:	

RETIREMENT ASSET #3		
ACCOUNT		
Primary Beneficiary:		Percentage:
Address:	Phone:	
Primary Beneficiary:		Percentage:
Address:	Phone:	
Contingent Beneficiary:		Percentage:
Address:	Phone:	
Contingent Beneficiary:		Percentage:
Address:	Phone:	
Contingent Beneficiary:		Percentage:
Address:	Phone:	