

**LIST OF WHO BENEFICIARIES ARE FOR RETIREMENT ACCOUNTS, LIFE INSURANCE, AND ANNUITIES FOR YOUR ESTATE PLAN**

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**AS PART OF YOUR ESTATE PLAN, YOU SHOULD REVIEW WHO YOUR BENEFICIARIES ARE FOR YOUR RETIREMENT ACCOUNTS, LIFE INSURANCE, AND ANNUITIES. THIS FORM WILL ASSIST YOU IN REVIEWING WHO YOUR BENEFICIARIES ARE.**

**1. Retirement accounts (IRA, IRA Roth, Keogh, 401(k), 403(b), SEP)**

a. Describe retirement account:

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Primary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

Secondary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

b. Describe retirement account:

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Primary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

Secondary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

c. Describe retirement account:

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Primary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

Secondary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

d. Describe retirement account:

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Primary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

Secondary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

**2. Life insurance**

a. Describe life insurance:

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Primary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

Secondary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

b. Describe life insurance:

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Primary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

Secondary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

c. Describe life insurance:

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Primary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

Secondary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

Describe life insurance::

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Primary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

Secondary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

3. **Annuities**

Describe annuity:

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Primary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

Secondary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

Describe annuity:

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Primary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

Secondary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

Describe annuity:

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Primary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

Secondary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

Describe annuity:

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Primary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____

Secondary beneficiaries:

Name	Percentage
_____	_____
_____	_____
_____	_____