

# Beneficiary Review Checklist

Review. Update. Repeat.



**CARLSON**  
FINANCIAL GROUP

Dream. Plan. Relax.

**Financial and Insurance Solutions for Life.**

[www.carlsonfinancialgroup.us](http://www.carlsonfinancialgroup.us)

(216) 586-4853

## 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 one of the best ways to help make sure that you are taking care of those most important to you.

Life Insurance	Primary Beneficiary	Relation	Contingent Beneficiary	Relation
<b>My Policy</b>				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
<b>Spouse</b>				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
<b>Child</b>				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
<b>Child</b>				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
Individual Retirement Account	Primary Beneficiary	Relation	Contingent Beneficiary	Relation
<b>IRA #1</b>				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	
<b>IRA #2</b>				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	
<b>Spousal IRA</b>				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	

Roth IRA				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	
Retirement Plans	Primary Beneficiary	Relation	Contingent Beneficiary	Relation
<b>401(k) Plan</b>				
Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	
<b>403(b) Plan</b>				
Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	
<b>457 Plan</b>				
Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	
<b>Keogh Plan</b>				
Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	
<b>SEP IRA Plan</b>				
Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	
<b>Defined Benefit/Pension Plan</b>				
Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	
Other Plans and Contracts	Primary Beneficiary	Relation	Contingent Beneficiary	Relation
<b>Deferred Compensation Plan</b>				
Employer	Name		Name	
	Address		Address	
	Phone		Phone	

Other Plans and Contracts	Primary Beneficiary	Relation	Contingent Beneficiary	Relation
<b>Annuity Contract</b>				
Issuing Company	Name		Name	
Contract #	Address		Address	
	Phone		Phone	
<b>Disability Policy</b>				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
<b>529 Plan</b>				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	
<b>Coverdell Education Savings Account</b>				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	



**Dream. Plan. Relax.**  
**Financial and Insurance Solutions for Life.**

**www.carlsonfinancialgroup.us**  
**(216) 586-4853**  
**13374 Ridge Rd.**  
**North Royalton, OH 44133**

This material is provided as a resource for information only. Neither Carlson Financial Group, nor its employees, provides tax, legal or accounting advice. Please consult your own tax, legal, or accounting professional before making any decisions.

Ryan Carlson, Registered Representative  
 Advisory Services offered through Capital Analysts or Lincoln Investment, Registered Investment Advisers. Securities offered through Lincoln Investment, Broker/Dealer, Member FINRA/SIPC  
[www.lincolninvestment.com](http://www.lincolninvestment.com)

Carlson Financial Group and the above firms are independent and non-affiliated.