

# Leaving a Legacy: *Beneficiary Designations*

Periodically reviewing your beneficiary selections is a wise idea to ensure you are leaving your legacy as you intend. As time marches on, decisions and relationships can sometimes change. The following occasions are excellent opportunities for you to review your beneficiary designations:

- **Your birthday!** It's a good idea to review beneficiaries each year, and using your birthday acts as a built-in reminder.
- **Job changes**, such as a new job or retirement.
- **Family matters**, including becoming a parent or grandparent; marriages or divorces; or a death in the family.
- **Financial moves**, such as purchasing a new home or taking out a loan.

Beneficiary reviews are a simple way to make your money mean more to future generations. Fill out the worksheet below to get started! Remember, **your financial professional can help you fill out the appropriate paperwork** to change beneficiary designations on an account. *This worksheet serves as a planning and review tool only.*

Account Type (example: annuity, life insurance, IRA, CD, etc.)						
Service Provider						
Account Value						
Primary Beneficiary	1.	%	1.	%	1.	%
	2.	%	2.	%	2.	%
	3.	%	3.	%	3.	%
Contingent Beneficiary	1.	%	1.	%	1.	%
	2.	%	2.	%	2.	%
	3.	%	3.	%	3.	%
Notes (example: your intentions for this money)						