# Life Events Checklist

**PLANNING FROM PROTECTION TO LEGACY**

## LIFE CHANGES, SO MUST YOUR BENEFICIARY DESIGNATIONS

**Make sure your beneficiary designations are up-to-date so assets pass as you intend.**

Mistakes or omissions on your financial account beneficiary forms can lead to unnecessary hassle, cost or hardship for those you intend to benefit. Take a few moments today to make sure you name beneficiaries to all of your financial accounts and update as necessary based on your recent life events or circumstances. You will feel prepared knowing that your wishes will be fulfilled, and your loved ones will know that you cared enough to make sure your assets transfer smoothly.

Use this worksheet and checklist to help you organize your information. Then, make sure the official beneficiary forms for each of your accounts are complete and reflect your needs and wishes. Completed forms must be sent to the firms where the accounts are held.

| Account/Type | Value | Firm/Organization | Primary Beneficiaries/ Relationship | Secondary Beneficiaries/ Relationship | Last Updated |
|---|---|---|---|---|---|
| | | | 1.<br>2. | 1.<br>2. | |
| | | | 1.<br>2. | 1.<br>2. | |
| | | | 1.<br>2. | 1.<br>2. | |
| | | | 1.<br>2. | 1.<br>2. | |
| | | | 1.<br>2. | 1.<br>2. | |
| | | | 1.<br>2. | 1.<br>2. | |
| | | | 1.<br>2. | 1.<br>2. | |
| | | | 1.<br>2. | 1.<br>2. | |

# Life Events Worksheet

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### LIFE CHANGES, SO MUST YOUR BENEFICIARY DESIGNATIONS

**Have any of the following life events happened to you in the past 12 months?**

| | Event |
|---|---|
| ☐ | Marriage |
| ☐ | Remarriage |
| ☐ | New job |
| ☐ | Birth of child |
| ☐ | Birth of grandchild |
| ☐ | Child turns 18 |
| ☐ | Death of beneficiary |
| ☐ | Marriage of adult child |
| ☐ | Divorce of adult child |
| ☐ | Recently retired |
| ☐ | Moved to a different state or country |

| | Event |
|---|---|
| ☐ | Divorce |
| ☐ | New insurance policy |
| ☐ | Rollover |
| ☐ | Adoption |
| ☐ | Illness or incapacitation of beneficiary |
| ☐ | Establishment of a trust |
| ☐ | Inheritance |
| ☐ | Change in company's retirement plan or pension |
| ☐ | Change in job status or income |
| ☐ | Change in health or health of spouse |
| ☐ | Other |

**Don't wait until it's too late, keep your files updated.**

Now is the time to ensure your beneficiary information is up to date and reflective of your wishes. Make a commitment to review this worksheet at least annually, and especially when you experience one of the life events listed above.



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