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Beneficiary Designations List

Many people are unaware that beneficiary designations can trump your will when it comes to who gets your money. Avoid the mess by recording your beneficiary designations here. Check and update this form once a year or upon major life changes.

Asset Name	Beneficiary, 2nd Beneficiary	Last Updated
Example 401(k)	1. Spouse 2. Children, equally	1/14/12

Be sure to list all life insurance policies, annuities, retirement accounts and bank accounts where you have filled out a beneficiary designation form.