

# Beneficiary Information Worksheet

As a part of your overall estate planning, it is important that your accounts have beneficiary assignments. With retirement accounts, they are *required*. We strongly recommend that all accounts include contingent (secondary) beneficiaries.

This worksheet indicates the specific information required in completing the beneficiary forms on new accounts.

**Primary Beneficiary(s)** - If married, the spouse must be 100% primary beneficiary unless there is spousal consent granting permission for another person to be assigned as primary. There must be at least one Primary Beneficiary.

**Contingent Beneficiaries** – These become the beneficiaries in the event the primary beneficiary passes away before, or at the same time as, the account holder. We *highly* recommend that contingent beneficiaries be listed.

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**Primary** Beneficiary Name \_\_\_\_\_  
Gender \_\_\_\_\_ Social Security or Tax ID Number \_\_\_\_\_  
Relationship \_\_\_\_\_ Date of Birth \_\_\_\_\_ Percentage \_\_\_\_\_  
Address \_\_\_\_\_  
Telephone \_\_\_\_\_ Per Stirpes\*

Primary  Contingent  
Beneficiary Name \_\_\_\_\_  
Gender \_\_\_\_\_ Social Security or Tax ID Number \_\_\_\_\_  
Relationship \_\_\_\_\_ Date of Birth \_\_\_\_\_ Percentage \_\_\_\_\_  
Address \_\_\_\_\_  
Telephone \_\_\_\_\_ Per Stirpes\*

Primary  Contingent  
Beneficiary Name \_\_\_\_\_  
Gender \_\_\_\_\_ Social Security or Tax ID Number \_\_\_\_\_  
Relationship \_\_\_\_\_ Date of Birth \_\_\_\_\_ Percentage \_\_\_\_\_  
Address \_\_\_\_\_  
Telephone \_\_\_\_\_ Per Stirpes\*

\*If the "Per Stirpes" box is checked: It means that if this beneficiary is deceased, then their percentage would flow to their living children. If not checked, their portion would be divided evenly between the remaining surviving beneficiaries.

Primary  Contingent

Beneficiary Name \_\_\_\_\_

Gender \_\_\_\_\_ Social Security or Tax ID Number \_\_\_\_\_

Relationship \_\_\_\_\_ Date of Birth \_\_\_\_\_ Percentage \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Per Stirpes\*

Primary  Contingent

Beneficiary Name \_\_\_\_\_

Gender \_\_\_\_\_ Social Security or Tax ID Number \_\_\_\_\_

Relationship \_\_\_\_\_ Date of Birth \_\_\_\_\_ Percentage \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Per Stirpes\*

Primary  Contingent

Beneficiary Name \_\_\_\_\_

Gender \_\_\_\_\_ Social Security or Tax ID Number \_\_\_\_\_

Relationship \_\_\_\_\_ Date of Birth \_\_\_\_\_ Percentage \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Per Stirpes\*

Primary  Contingent

Beneficiary Name \_\_\_\_\_

Gender \_\_\_\_\_ Social Security or Tax ID Number \_\_\_\_\_

Relationship \_\_\_\_\_ Date of Birth \_\_\_\_\_ Percentage \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Per Stirpes\*

Primary  Contingent

Beneficiary Name \_\_\_\_\_

Gender \_\_\_\_\_ Social Security or Tax ID Number \_\_\_\_\_

Relationship \_\_\_\_\_ Date of Birth \_\_\_\_\_ Percentage \_\_\_\_\_

Address \_\_\_\_\_

Telephone \_\_\_\_\_ Per Stirpes\*