Beneficiary Planning Workbook

A Comprehensive Guide to Securing Your Family's Financial Future

Provided by SafeHaven Insurance

Introduction

This workbook will guide you through the essential steps of beneficiary planning, helping you make informed decisions about your family's financial security. Take your time to complete each section thoroughly.

> Keep this workbook in a safe place and review it annually or when major life changes occur.

Personal Information

Full Name:

Date of Birth:

Social Security Number (last 4 digits):

Family Information

Name	Relationship	Date of Birth	Contact Information

Asset Inventory

Asset Type	Institution	Account Number	Approximate Value	Current Beneficiary
Life Insurance				

Asset Type	Institution	Account Number	Approximate Value	Current Beneficiary
Retirement Accounts				
Bank Accounts				

Insurance Coverage Calculator

Expense Category	Estimated Amount
Final Expenses (Funeral, Medical Bills)	$
Outstanding Debts	$
Income Replacement	$
Education Fund	$
Emergency Fund	$
Total Coverage Needed	$

Important Documents Checklist

- ☐ Will
- ☐ Trust Documents
- ☐ Life Insurance Policies
- ☐ Birth Certificates
- ☐ Marriage Certificate
- ☐ Property Deeds
- ☐ Vehicle Titles
- ☐ Tax Returns
- ☐ Military Service Records
- ☐ Social Security Cards

Legacy Planning Goals

Short-term Goals (1-5 years):

Long-term Goals (5+ years):

Special Instructions or Wishes:

Professional Contacts

Type	Name	Contact Information
Insurance Agent		
Attorney		
Financial Advisor		
Accountant		

Next Steps:

1. Complete all sections of this workbook
2. Review with your family members
3. Schedule a consultation with a SafeHaven advisor
4. Update annually or when major life changes occur

For questions or assistance, contact us at (844) 628-4442