

**Beneficiary Report - 1/13/2022**  
**For Informational Purposes Only**



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**VENZON, BRET & LULU**

**BRET VENZON**

► BRET VENZON ROTH IRA

<u>Custodian</u>	<u>Account Type</u>	
TD Ameritrade Institutional	Roth IRA	
<u>Beneficiary Name</u>	<u>Bene Type</u>	<u>Percent</u>
ANNETT VENZON	Primary	100%
STEPHAN VENZON	Contingent	50%
WYATT VENZON	Contingent	50%

► BRET VENZON TRUST

<u>Custodian</u>	<u>Account Type</u>
TD Ameritrade Institutional	Trust

See most recent Trust documents for beneficiary information

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**LULU VENZON**

► LULU VENZON ROTH IRA

<u>Custodian</u>	<u>Account Type</u>	
TD Ameritrade Institutional	Roth IRA	
<u>Beneficiary Name</u>	<u>Bene Type</u>	<u>Percent</u>
DOTTY VENZON	Primary	100%
BRADY VENZON	Contingent	50%
OLINDA VENZON	Contingent	50%

*This report was generated by FPIS, Inc. for informational purposes only and should not be considered as the original beneficiary designation form completed and signed by you for your account(s) held under our management at TD Ameritrade and/or another custodian. It is our intent to show what we have in our records only and to verify the accuracy of said information through further discussion with you.*