

	Name	Type	In Whose Name	Notes	Take Action if Ken dies
Banking	Alliant Credit Union	Checking	Both	Joint	Yes. See notes below.
	Alliant Credit Union	Savings	Both	Joint	Yes. See notes below.
	Ally Bank	Savings	Both	Joint	Yes. See notes below.
	Members Heritage FCU	All 3 Accounts	Both	Joint	Yes. See notes below.
	Pentagon Federal	All 3 Accounts	Me	You are the beneficiary	Yes. See notes below.
	M1	Savings	Both	Joint	Yes. See notes below.
Investments	M1 Finance	Traditional IRA	Me	You are the beneficiary.	Yes. See notes below.
	M1 Finance	ROTH IRA	Me	You are the beneficiary.	Yes. See notes below.
	M1 Finance	Beneficiary IRA	Me	You are the beneficiary.	Yes. See notes below.
	M1 Finance	Jenny's ROTH IRA	You	You are the owner	Yes. See notes below.
	M1 Finance	Beneficiary IRA	Me	You are the beneficiary.	Yes. See notes below.
	M1 Finance	Brokerage Account	Me	You are the beneficiary.	Yes. See notes below.
	Fidelity	Health Savings Account		You are the beneficiary.	Yes. See notes below.
Pensions					
	Fidelity Net Benefits	Pension	Me	511.98/month starting on 01DEC2028	Yes. Contact Fidelity Net Benefits to see if you're eligible for any of my pension.
	Milliman Benefits	Pension	Me	2048.12/month starting on 21NOV2028	Yes. Contact Milliman Benefits to see if you're eligible for any of my pension.
NOTES:	Many bills and most credit cards are paid automatically from our Alliant Credit Union Checking account. If Ken dies, you will need to pay these manually or keep enough in the Alliant Credit Union Checking account to cover.				
	Promise Kids a Future gets paid monthly from Alliant CU bill pay. Also, \$15 is automatically transferred from Alliant Checking to Members Heritage Checking annually in mid November to pay for the safe deposit box.				
	You will have to contact the banks, M1, Fidelity, and Milliman to get everything transferred to you.				
Trust Accounts (Mom)	Alliant Credit Union	Checking	Trust		
	Alliant Credit Union	Savings	Trust		