

	Name	Type	In Whose Name	As of 2023-12-18	Notes	Take Action if I die
Banking	Alliant Credit Union	Checking	Both	\$1,000.00		Yes. See notes below.
	Alliant Credit Union	Savings	Both	\$5,000.00		
	Ally Bank	Savings	Both	\$23,000.00		
	Chard Snyder	Health Savings	Me	\$26,100.00		Yes. Transfer to yourself
	Members Heritage FCU	All 3 Accounts	Both	\$101.00		
	Pentagon Federal	All 3 Accounts	Me	\$25.00		You are the beneficiary
	M1	Savings	Me	\$52,000.00		Joint
				\$107,226.00		
Investments	M1 Finance	Traditional IRA	Me	\$1,111,100.00		Yes. Transfer to yourself
	M1 Finance	ROTH IRA	Me	\$221,800.00		Yes. Transfer to yourself
	M1 Finance	ROTH IRA	You	\$360,100.00		
	Fidelity	Inherited Traditional IRA	Me	\$205,000.00		Yes. Transfer to yourself
	Fidelity	Brokerage	Both	\$355,000.00		Joint
				\$2,253,000.00		
Pensions	Fidelity Net Benefits	IBM 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	Keeneland 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 the Alliant Credit Union Checking account. If I 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.					
Trust Accounts	Alliant Credit Union	Checking	Trust	\$5.00		
	Alliant Credit Union	Savings	Trust	\$89,383.00		