

	Name	Type	In Whose Name	Notes	Take Action if I die
Banking	Alliant Credit Union	Checking	Both		Yes. See notes below.
	Alliant Credit Union	Savings	Both		
	Ally Bank	Savings	Both		
	Chard Snyder	Health Savings	Me		Transferring to Fidelity on 8/9/2024
	Members Heritage FCU	All 3 Accounts	Both		
	Pentagon Federal	All 3 Accounts	Me		You are the beneficiary.
	M1	Savings	Both		
Investments	M1 Finance	Traditional IRA	Me		You are the beneficiary.
	M1 Finance	ROTH IRA	Me		You are the beneficiary.
	M1 Finance	ROTH IRA	You		
	Fidelity	IRA - BDA	Me		You are the beneficiary.
	Fidelity	Joint WROS - TOD	Both		
	Fidelity	Health Savings Account			You are the beneficiary.
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 the Alliant Credit Union Checking account. If I die, 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		
	Alliant Credit Union	Savings	Trust		