

Beneficiary Designation Form

I, [_____],

residing at [_____], hereby designate the following individuals as beneficiaries to receive the proceeds of my assets upon my death:

1. Life Insurance Policies:

Policy Number: [_____]

- Primary Beneficiary: [_____]
- Contingent Beneficiary: [_____]
-

Policy Number: [_____]

- Primary Beneficiary: [_____]
- Contingent Beneficiary: [_____]

2. Retirement Accounts:

Account Type: [IRA, 401(k), etc.] _____

- Primary Beneficiary: [_____]
- Contingent Beneficiary: [_____]

Account Type: [IRA, 401(k), etc.] _____

- Primary Beneficiary: [_____]
- Contingent Beneficiary: [_____]

3. Bank Accounts:

Account Type: [Savings, Checking, etc.] _____

- Primary Beneficiary: [_____]
- Contingent Beneficiary: [_____]

Account Type: [Savings, Checking, etc.] _____

- Primary Beneficiary: [_____]
- Contingent Beneficiary: [_____]

Account Type: [Savings, Checking, etc.] _____

- Primary Beneficiary: [_____]
- Contingent Beneficiary: [_____]

Account Type: [Savings, Checking, etc.] _____

- Primary Beneficiary: [_____]
- Contingent Beneficiary: [_____]

4. Investment Accounts:

Account Type: [Brokerage, Mutual Funds, etc.] _____

- Primary Beneficiary: [_____]
- Contingent Beneficiary: [_____]

Account Type: [Brokerage, Mutual Funds, etc.] _____

- Primary Beneficiary: [_____]
- Contingent Beneficiary: [_____]

Account Type: [Brokerage, Mutual Funds, etc.] _____

- Primary Beneficiary: [_____]
- Contingent Beneficiary: [_____]

5. Other Assets:

Description of Asset: [Description, e.g., Real Estate, Vehicle, etc.]

- Primary Beneficiary: [_____]
- Contingent Beneficiary: [_____]

Description of Asset: [Description, e.g., Real Estate, Vehicle, etc.]

- Primary Beneficiary: [_____]
- Contingent Beneficiary: [_____]

Description of Asset: [Description, e.g., Real Estate, Vehicle, etc.]

- Primary Beneficiary: [_____]
- Contingent Beneficiary: [_____]

6. Successor Beneficiary:

In the event that a designated primary beneficiary is unable or unwilling to receive the assets, I designate the following individual as the successor beneficiary:

Successor Beneficiary: [Successor Beneficiary's Full Legal Name]

7. Signatures:

I have executed this Beneficiary Designation Form

on this [Date_____]

day of [Month, Year_____ / _____].

[Your Full Legal Name] _____

Date: [Date] _____

[Witness 1 Name]

[Witness 1 Signature]

[Witness 2 Name]

[Witness 2 Signature]
