

Beneficiary Review Checklist

Please gather statements, policies and contracts for your next appointment. Below is a list of the different types of items to include:

- Annuity
- Life Insurance
- IRA
- 401(k) / 403(b)
- Pension
- Other Retirement
- Non-Retirement
- 529 College Savings
- Mutual Fund
- Bank Statements

Notes:

Securities & Insurance products offered through LPL Financial and its affiliates, member FINRA/SIPC.

To the extent you are receiving investment advice from a separately registered independent investment advisor, please note that LPL Financial is not an affiliate of and makes no representation with respect to such entity.

Not FDIC/NCUA Insured	Not Bank/Credit Union Guaranteed	May Lose Value	Not Insured by any Federal Government Agency	Not a Bank Deposit
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