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:

LPL Financial

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