Life moves quickly.

That is why it’s important to keep beneficiary designations up-to-date and accurate after every major life event in your family. Ensure your wishes are carried out by identifying your accounts with beneficiary designations, such as:

- Qualified Plans (401(k)s, 403(b)s, etc.)
- Individual retirement accounts (IRAs, Roth IRAs, SEP IRAs, SIMPLE IRAs)
- Insurance accounts (Life Insurance policies, Annuities, HSAs, Long-Term Care policies, etc.)
- Education accounts (529 plans, Coverdells, etc.)
- Transfer-on-death or payable-on-death accounts (bank accounts, CDs, etc.)
- Other employer-provided benefit programs (PSPs, DB plans, Money Purchase Plans, ESOPs, etc.)

Once you identify these accounts use the Beneficiary Review Worksheet provided by TransAmerica to determine if your beneficiary designation information is accurate and current.

Please call me at 972-702-6080 if you need to update your beneficiary information or if you have any questions about an account. I am happy to help you with any financial concern you may have.

Sincerely,

From the desk of Bill Saplicki

From the desk of Bill Saplicki
Bill@ls-ws.com
LS Wealth Strategies LLC
14755 Preston Rd.
Ste. 823
Dallas, TX 75254
972-702-6080