

Be sure your beneficiary information is up to date.

Take Control and get organized

- Review your beneficiary designations.
- Fill out this worksheet.
- Bring it to your next appointment with your financial professional.

Identify your beneficiaries.	Tell us about each of them.	Make a wish. What, more than anything, do you wish for this person?	From 1-10, how comfortable are you that your beneficiaries will be able to handle a lump-sum distributon to fulfill your wish for them?	How would you like to leave your financial legacy to you beneficiaries to ensure your wishes are met?
<p>Example</p> <p>Mary</p>	<p>Oldest daughter, age 38, single mom, two children: Matt, age 8; Grace, age 6</p>	<p>To be able to fund her childrens' college education.</p>	<p>Mary is financially responsible, and the lump sum could supplement her kids' college fund.</p> <p>1 2 3 4 5 6 7 8 9 10 Least Most</p>	<p><input checked="" type="checkbox"/> Immediate access <input type="checkbox"/> Lifetime income <input type="checkbox"/> Life expectancy payments <input type="checkbox"/> Structured in will or trust <input type="checkbox"/> Other</p>
			<p>1 2 3 4 5 6 7 8 9 10 Least Most</p>	<p><input type="checkbox"/> Immediate access <input type="checkbox"/> Lifetime income <input type="checkbox"/> Life expectancy payments <input type="checkbox"/> Structured in will or trust <input type="checkbox"/> Other</p>
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Important: Completing this worksheet will not change any of your beneficiaries. If you wish to make changes, your financial professional will be able to help you.