

# Beneficiary & Important Contact Information

Life Insurance			
<b>My Policy:</b>	<b>Primary Beneficiary</b>	<b>Contingent Beneficiary # 1</b>	<b>Contingent Beneficiary # 2</b>
Company	Name / Relation	Name / Relation	Name / Relation
Policy #	Address	Address	Address
	Phone	Phone	Phone
<b>Spouse:</b>			
Company	Name / Relation	Name / Relation	Name / Relation
Policy #	Address	Address	Address
	Phone	Phone	Phone
<b>Child:</b>			
Company	Name / Relation	Name / Relation	Name / Relation
Policy #	Address	Address	Address
	Phone	Phone	Phone
<b>Child:</b>			
Company	Name / Relation	Name / Relation	Name / Relation
Policy #	Address	Address	Address
	Phone	Phone	Phone
Individual Retirement Account			
<b>IRA #1</b>	<b>Primary Beneficiary</b>	<b>Contingent Beneficiary # 1</b>	<b>Contingent Beneficiary # 2</b>
Company	Name / Relation	Name / Relation	Name / Relation
Account #	Address	Address	Address
	Phone	Phone	Phone
<b>IRA #2</b>			
Company	Name / Relation	Name / Relation	Name / Relation
Account #	Address	Address	Address
	Phone	Phone	Phone
<b>Spousal IRA</b>			
Company	Name / Relation	Name / Relation	Name / Relation
Account #	Address	Address	Address
	Phone	Phone	Phone
<b>Roth IRA</b>			
Company	Name / Relation	Name / Relation	Name / Relation
Account #	Address	Address	Address
	Phone	Phone	Phone

continued...

<b>Retirement Plans</b>			
<b>ELCA Retirement Plan (403(b) Account)</b>	<b>Primary Beneficiary</b>	<b>Contingent Beneficiary # 1</b>	<b>Contingent Beneficiary # 2</b>
Company	Name / Relation	Name / Relation	Name / Relation
Policy #	Address	Address	Address
	Phone	Phone	Phone
<b>401(k) Plan</b>			
Company	Name / Relation	Name / Relation	Name / Relation
Policy #	Address	Address	Address
	Phone	Phone	Phone
<b>457 Plan</b>			
Company	Name / Relation	Name / Relation	Name / Relation
Policy #	Address	Address	Address
	Phone	Phone	Phone
<b>Defined Benefit / Pension Payments</b>			
Company	Name / Relation	Name / Relation	Name / Relation
Policy #	Address	Address	Address
	Phone	Phone	Phone
<b>Other Plans and Contracts</b>			
<b>Annuity</b>	<b>Primary Beneficiary</b>	<b>Contingent Beneficiary # 1</b>	<b>Contingent Beneficiary # 2</b>
Company	Name / Relation	Name / Relation	Name / Relation
Account #	Address	Address	Address
	Phone	Phone	Phone
<b>Disability</b>			
Company	Name / Relation	Name / Relation	Name / Relation
Account #	Address	Address	Address
	Phone	Phone	Phone
<b>529 Plan</b>			
Company	Name / Relation	Name / Relation	Name / Relation
Account #	Address	Address	Address
	Phone	Phone	Phone
<b>Coverdell Education Savings Account</b>			
Company	Name / Relation	Name / Relation	Name / Relation
Account #	Address	Address	Address
	Phone	Phone	Phone

Online Accounts		
Website Address (URL)	Username	Password

Location
Specify the location(s) where you keep your documents (e.g., home, office, safe, safe-deposit box). For each item in the <u>Important Documents below</u> , check the number that corresponds to the correct location.
Location 1 :
Location 2 :
Location 3 :
Location 4 :
Location 5 :

Important Documents	1	2	3	4	5
Will					
Durable Power of Attorney					
Health-Care Directives					
Trust Agreements					
Birth Certificate					
Social Security Card					
Marriage Certificate					
Military Papers					
Adoption Papers					
Divorce / Separation Papers					
Vehicle Titles					
Deeds					
Safe-Deposit Box / Keys					
Bank Account Records (e.g., checking and savings accounts, CDs)					
Tax Returns					
Mortgage and Loan Papers					
Insurance Policies -- Home and Vehicles					
Insurance Policies -- Property and Casualty					
Insurance Policies -- Life					
Insurance Policies -- Health					
Business Account Papers (e.g., incorporation papers, trademarks, patents)					
Retirement Account Papers (e.g., IRAs, annuities)					

Important Documents (continued)	1	2	3	4	5
Investment Papers (e.g., securities, stocks, bonds, mutual funds)					
Proof of Citizenship					
Important Keys					
Antiques and Heirlooms					
Jewelery					
Cash					
Funeral Instructions					
<b>Notes</b>					

Trust Account Information	
<b>Trusts</b>	
Trust Name	Trust Date
For the Benefit of	Grantor
Tax ID #	
<b>Professional Contacts</b>	
<b>CPA</b>	
Company	Name
Phone	Address
Email	
<b>Attorney</b>	
Company	Name
Phone	Address
Email	
<b>Insurance Agent</b>	
Company	Name
Phone	Address
Email	Policy #
<b>Financial Planner</b>	
Company : Portico Benefits	Name
Phone : 800.922.4896	Address
Email	