



Beneficiary Review Checklist

Session 4 - Protecting the Household and the Financial House | Participant Resource | Version 1.0

Privacy: Keep this resource for your personal use. Do not write account numbers, passwords, Social Security numbers, full birth dates, or other sensitive identifiers.

Review directly with each provider

- ☐ Primary beneficiary is listed and current.
- ☐ Contingent beneficiary is listed where appropriate.
- ☐ Names and relationships are accurate.
- ☐ Major life changes have been considered.
- ☐ Estate, trust, minor-child, or special-needs questions are referred to an attorney.
- ☐ A confirmation or record is stored securely.

Important

Do not assume a will overrides every beneficiary designation. Verify with each plan, account, policy, or benefit provider.

First account or benefit to review: _____

Education notice: FFES provides general financial education, not individualized investment, tax, legal, insurance, credit, mortgage, Social Security, Medicare, pension, or estate-planning advice. Rules and individual circumstances differ and can change.