

**Madison Planning Group**

4 New King Street, Suite 120 • White Plains, NY 10604  
Telephone: 800.222.2091 • Fax: 800.249.9403



**Beneficiary Form Checklist**

Name \_\_\_\_\_ Date \_\_\_\_\_

Advisor's Name \_\_\_\_\_

1.) Where are copies of the beneficiary forms kept? \_\_\_\_\_

Can the copies be found? (Do they match what is on file with the plan? If not, request copies from the plan or ask us to send new forms to replace.)

Do beneficiaries or the executor of the estate know where to find copies of the beneficiary form and/or will?

2.) Are your beneficiary forms current? \_\_\_\_\_

Have you considered any life events that could change beneficiary choices?

- Adoption
- Births – Children/Grandchildren
- Divorces
- Special needs beneficiaries
- Beneficiaries to eliminate
- Deaths
- Marriages
- Other life events

3.) Is there a contingent beneficiary named on each beneficiary form? \_\_\_\_\_

4.) Did you know that Retirement assets will pass accordingly to the beneficiary form, not the will.

**Do You Have Questions About Your Beneficiaries?**

Call us 800.222.2091

Fax us 800.249.9403

Email us [News@MadisonPlanning.com](mailto:News@MadisonPlanning.com)