



# BENEFICIARY REVIEW CHECKLIST

Please gather your investment statements, policies, and contracts for your next appointment with your financial professional. This worksheet can help you get your beneficiaries and accounts organized. Below is a list of the different types of items to include.

### Account Type

- Annuity
- IRA
- Other Retirement
- Mutual Fund
- Life Insurance
- 401(k)
- Non-retirement
- Brokerage Account
- Pension
- 529 College Savings

Financial Institution/Plan Name: \_\_\_\_\_

Contract/Account Number: \_\_\_\_\_

Primary Beneficiaries	Contingent Beneficiaries
1. _____ %	a. _____ % b. _____ % c. _____ %
2. _____ %	a. _____ % b. _____ % c. _____ %
3. _____ %	a. _____ % b. _____ % c. _____ %

Insurance products are issued by Pacific Life Insurance Company in all states except New York and in New York by Pacific Life & Annuity Company. Product availability and features may vary by state.

**No bank guarantee • Not a deposit • May lose value  
Not FDIC/NCUA insured • Not insured by any federal government agency**

Work with your financial professional to help you navigate your beneficiary planning needs. To learn more, visit [PacificLife.com](http://PacificLife.com).

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Notes:

VLC2265-0921W



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