PACIFIC LIFE

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

Financial Institution/Plan Name: ______________________________

Contract/Account Number: ______________________________

Primary Beneficiaries	Contingent Beneficiaries
1. ____________ ____ %	a. ____________ ____ % b. ____________ ____ % c. ____________ ____ %
2. ____________ ____ %	a. ____________ ____ % b. ____________ ____ % c. ____________ ____ %
3. ____________ ____ %	a. ____________ ____ % b. ____________ ____ % c. ____________ ____ %

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Work with your financial professional to help you navigate your beneficiary planning needs. To learn more, visit PacificLife.com.

Notes:

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