

Beneficiary review checklist

Review. Update. Repeat.



MAINSTAY
INVESTMENTS®

Sometimes, life comes at you fast.

And, it can change your financial priorities in the blink of an eye. Revisiting your beneficiaries—especially after major life events—is the best way to make sure that you are taking care of those most important to you.

Life Insurance	Primary Beneficiary	Relation	Contingent Beneficiary	Relation
My Policy				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
Spouse				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
Child				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
Child				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
Individual Retirement Account	Primary Beneficiary	Relation	Contingent Beneficiary	Relation
IRA #1				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	
IRA #2				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	
Spousal IRA				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	

Roth IRA

Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	

Retirement Plans	Primary Beneficiary	Relation	Contingent Beneficiary	Relation
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401(k) Plan

Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	

403(b) Plan

Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	

457 Plan

Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	

Keogh Plan

Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	

SEP IRA Plan

Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	

Defined Benefit/Pension Plan

Employer	Name		Name	
Account #	Address		Address	
	Phone		Phone	

Other Plans and Contracts	Primary Beneficiary	Relation	Contingent Beneficiary	Relation
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Deferred Compensation Plan

Employer	Name		Name	
	Address		Address	
	Phone		Phone	

Other Plans and Contracts	Primary Beneficiary	Relation	Contingent Beneficiary	Relation
Annuity Contract				
Issuing Company	Name		Name	
Contract #	Address		Address	
	Phone		Phone	
Disability Policy				
Issuing Company	Name		Name	
Policy #	Address		Address	
	Phone		Phone	
529 Plan				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	
Coverdell Education Savings Account				
Company	Name		Name	
Account #	Address		Address	
	Phone		Phone	



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For more information
 888-474-7725
mainstayinvestments.com or newyorklifeannuities.com

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