Post-Estate Planning Action Checklist

Name (s):

Date Completed:

Use this worksheet to update your beneficiary designations and account titles in alignment with your estate plan.

Step 1: Gather Necessary Forms

Request Change of Beneficiary forms from each of the following:

- ☐ Retirement plan administrators (e.g., 401(k), IRA)
- ☐ Life insurance providers
- ☐ Annuities (if applicable)

Step 2: Gather Beneficiary Forms

For each account, complete the form using the information provided in your estate plan documents.

- ☐ Fill in your full name, address, date of birth, and Social Security Number
- ☐ Use the appropriate language when listing beneficiaries:
    - Primary Beneficiary example:
        - "To my spouse, John Doe, if he survives me."
    - Contingent Beneficiaries:
        - List backup beneficiaries in the event the primary predeceases you.

> Your estate planning attorney may have provided specific wording—refer to that language exactly.

Please include a copy of the recommended beneficiary language from your attorney

- Attached to this form
- Sent in a separate attachment via email

Section A: Accounts That Require Beneficiary Updates

Account/Asset	Institution or Owner	Action Needed	Completed
e.g., 401(k)	Navista Wealth	Update Beneficiaries	✓
			☐
			☐
			☐
			☐
			☐
			☐

Section B: Accounts That Require Beneficiary Updates

Account/Asset	Institution or Owner	Title Change Needed	Completed
e.g., Joint Bank Account	Wells Fargo	Re-title to living trust	✓
			☐
			☐
			☐
			☐
			☐
			☐

Step 3: Confirm Updates

- ☐ Keep copies of all submitted forms
- ☐ Request confirmation in writing from the institution that changes were accepted
- ☐ Store updated documents in your estate planning folder

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