John Hancock
MUTUAL FUNDS

Beneficiary Checklist

Date:

NOTE

If you need more room for accounts, it might be time to consolidate. Just ask your financial professional to help you simplify your accounts.

Many common IRA mistakes could be avoided

by making sure your beneficiary forms are complete, accurate and current — for all accounts. Do this today, for your loved ones and heirs. You'll leave behind not just your assets, but the knowledge that you cared enough for your loved ones to make the asset transfer easy for them.

Naming beneficiaries is an important responsibility, but it doesn't have to be a difficult one. This page is designed to help you easily keep track of any and all accounts that allow you to name a beneficiary, such as all types of IRAs, all types of retirement plans, annuities and life insurance policies.

Take the time now to complete this checklist and then keep it in a safe and secure place. Set a specific time each year to review, and use the **Life Event Checklist** on the back as a prompt for updating your accounts. Remember that your loved ones will one day thank you for it!

Account	Type	Primary beneficiaries/ relationship	Secondary beneficiaries/ relationship	Last updated
		1. 2.	1. 2.	
		1. 2.	1. 2.	
		1. 2.	1. 2.	
		1. 2.	1. 2.	
		1. 2.	1. 2.	
		1. 2.	1. 2.	
		1. 2.	1. 2.	
		1. 2.	1. 2.	
		1. 2.	1. 2.	

Life Event Checklist

Have any of these life events happened to you in the past 12 months?

Any one of these life events checked could mean your beneficiary forms need updating. If you have more than one checked, bring this sheet to your financial professional for a thorough beneficiary review!

✔ Check all that apply

- ☐ Marriage
- ☐ Divorce
- ☐ Remarriage
- ☐ Birth of a child
- ☐ Birth of a grandchild
- ☐ Adoption
- ☐ Child attains adulthood
- ☐ Marriage of an adult child
- ☐ Divorce of an adult child
- ☐ New job
- ☐ Rollover
- ☐ New insurance policy
- ☐ Illness or incapacitation of a beneficiary
- ☐ Inheritance, or expectations of one
- ☐ Establishment of a trust
- ☐ Death of a beneficiary
- ☐ Change in company's retirement plan or insurance providers

Missing beneficiary information?

Call your financial professional or contact the firm where your assets are located. You can complete a new beneficiary form easily, but a new form automatically cancels the old. So be sure to fill out every section of the beneficiary form, even if you only wanted to update one item. And remember to mail it in! The firm holding your assets must have it in their possession for it to be valid.

Please note that listing beneficiaries on this form does not add, delete or change the beneficiary on your account. Please use the appropriate form(s) to amend your current beneficiaries on your account(s). Contact your financial professional to determine the forms needed to amend beneficiary selections.

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