

[INVESTOPEDIA LINK TO BENEFICARY DESIGNATIONS EXPLANATION](#)

## Beneficiary Summary

Keep your beneficiaries up to date to ensure your assets end up in the right hands.

Edit your beneficiaries for these accounts

**CORE -** Redacted

Redacted

### PRIMARY

|                            |                           |
|----------------------------|---------------------------|
| <b>Name</b>                | SARA Redacted<br>Redacted |
| <b>Relationship</b>        | Spouse                    |
| <b>Percentage Assigned</b> | 100%                      |
| <b>Date of Birth</b>       | Redacted                  |
| <b>SSN</b>                 | Redacted                  |
| <b>Per Stirpes</b>         | Yes                       |

### CONTINGENT

|                            |                                      |
|----------------------------|--------------------------------------|
| <b>Name</b>                | Child One<br>Child Two               |
| <b>Relationship</b>        | Son<br>Daughter                      |
| <b>Percentage Assigned</b> | 50% to Child One<br>50% to Child Two |
| <b>Date of Birth:</b>      |                                      |
| <b>SSN</b>                 | Child One SSN<br>Child Two SSN       |

|                    |     |                                                                                                                                                                                                   |
|--------------------|-----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Per Stirpes</b> | Yes | (Per Stirpes means by Representation which gives what would have gone to an adult child to the then living children of your adult child (your grandchildren) if your adult child predeceases you. |
|--------------------|-----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

**ROTH IRA -** Redacted

Redacted

## PRIMARY

|                     |                           |
|---------------------|---------------------------|
| Name                | SARA Redacted<br>Redacted |
| Relationship        | Spouse                    |
| Percentage Assigned | 100%                      |
| Date of Birth       | Redacted                  |
| SSN/TIN             | Redacted                  |
| Per Stirpes         | No                        |

## CONTINGENT

|                     |                                               |
|---------------------|-----------------------------------------------|
| Name                | CHRISTOPHER S.<br>MULVANEY SEP.<br>PROP TRUST |
| Relationship        | Trust                                         |
| Percentage Assigned | 100%                                          |
| Date of Trust       | Redacted                                      |
| SSN/TIN             | Redacted                                      |
| Per Stirpes         | No                                            |

401(K) Redacted  
Redacted

## PRIMARY

|                     |                           |
|---------------------|---------------------------|
| Name                | SARA Redacted<br>Redacted |
| Relationship        | Spouse                    |
| Percentage Assigned | 100%                      |
| Date of Birth       | Redacted                  |
| SSN/TIN             | Redacted                  |
| Per Stirpes         | No                        |

## CONTINGENT

|      |                                 |
|------|---------------------------------|
| Name | CHRISTOPHER S.<br>MULVANEY SEP. |
|------|---------------------------------|

## PROP TRUST

|                     |          |
|---------------------|----------|
| Relationship        | Trust    |
| Percentage Assigned | 100%     |
| Date of Trust       | Redacted |
| SSN/TIN             | Redacted |
| Per Stirpes         | No       |

