

[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**

**Name** SARA Redacted  
Redacted

**Relationship** Spouse

**Percentage Assigned** 100%

**Date of Birth** Redacted

**SSN** Redacted

**Per Stirpes** Yes

**CONTINGENT**

**Name** Child One  
Child Two

**Relationship** Son  
Daughter

**Percentage Assigned** 50% to Child One  
50% to Child Two

**Date of Birth:** Child One SSN  
Child Two SSN

**SSN** Child One SSN  
Child Two SSN

**Per Stirpes** 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  
Redacted

Relationship Spouse

Percentage Assigned 100%

Date of Birth Redacted

SSN/TIN Redacted

Per Stirpes No

CONTINGENT

Name CHRISTOPHER S.  
MULVANEY SEP.  
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  
Redacted

Relationship Spouse

Percentage Assigned 100%

Date of Birth Redacted

SSN/TIN Redacted

Per Stirpes No

CONTINGENT

Name CHRISTOPHER S.  
MULVANEY SEP.



PROP TRUST

**Relationship** Trust

**Percentage Assigned** 100%

**Date of Trust** Redacted

**SSN/TIN** Redacted

**Per Stirpes** No

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EXAMPLE