

[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	No

CONTINGENT

Name	Child One Child Two
Relationship	Son Daughter
Percentage Assigned	50% to Child One 50% to Child Two
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.
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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.
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PROP TRUST

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



EXAMPLE