Insurance & Beneficiaries

Life insurance, retirement accounts and payable-on-death accounts go to the beneficiary you named, whatever your will says. Check each one.

Insurance policies

Insurance company	Type	Policy no. (last 4)	Amount	Beneficiary

Your Certificate of Receipt from United Life & Health lists the carrier and application number for policies you applied for through the association.

Beneficiary review

Policy or account	Primary beneficiary	Backup beneficiary	Last checked

People and pets who depend on me

GUARDIAN FOR MINOR CHILDREN OR DEPENDENTS

BACKUP GUARDIAN

CARETAKER FOR MY PETS

BACKUP CARETAKER

NOTES FOR THE GUARDIAN OR CARETAKER

For your personal records. This kit is not a will and is not legal advice. Laws vary by state; talk to a licensed attorney about your situation.