



## Beneficiary information workbook

Use this workbook to bring together relevant details about the beneficiaries of your accounts and policies to help continue your legacy.

Owner Name: \_\_\_\_\_ Date: \_\_\_\_\_

Financial Representative: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The information in this workbook is general in nature and intended for informational purposes only. This information does not constitute, and should not be relied upon as, legal or tax advice.

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Before investing, carefully consider a fund's objectives, risks, charges and expenses. Summary and full prospectuses containing this and other information are available from [sentinelinvestments.com](http://sentinelinvestments.com). Please read them carefully.



# Individual retirement accounts

## Account 1

Financial institution \_\_\_\_\_

Phone \_\_\_\_\_

Website \_\_\_\_\_

User / Password \_\_\_\_\_

Account \_\_\_\_\_

Check one:  Traditional IRA  Roth IRA  other

## Account 2

Financial institution \_\_\_\_\_

Phone \_\_\_\_\_

Website \_\_\_\_\_

User / Password \_\_\_\_\_

Account \_\_\_\_\_

Check one:  Traditional IRA  Roth IRA  other

## Beneficiary 1

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Date of birth \_\_\_\_\_

Social Security \_\_\_\_\_

Relationship \_\_\_\_\_

Share % \_\_\_\_\_

Check one:  Primary  Contingent

## Beneficiary 1

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Date of birth \_\_\_\_\_

Social Security \_\_\_\_\_

Relationship \_\_\_\_\_

Share % \_\_\_\_\_

Check one:  Primary  Contingent

## Beneficiary 2

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Date of birth \_\_\_\_\_

Social Security \_\_\_\_\_

Relationship \_\_\_\_\_

Share % \_\_\_\_\_

Check one:  Primary  Contingent

## Beneficiary 2

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Date of birth \_\_\_\_\_

Social Security \_\_\_\_\_

Relationship \_\_\_\_\_

Share % \_\_\_\_\_

Check one:  Primary  Contingent

# Company-sponsored retirement plans

## Account 1

Employer \_\_\_\_\_

Plan type \_\_\_\_\_

Phone \_\_\_\_\_

Website \_\_\_\_\_

User / Password \_\_\_\_\_

Account \_\_\_\_\_

## Account 2

Employer \_\_\_\_\_

Plan type \_\_\_\_\_

Phone \_\_\_\_\_

Website \_\_\_\_\_

User / Password \_\_\_\_\_

Account \_\_\_\_\_

## Beneficiary 1

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Date of birth \_\_\_\_\_

Social Security \_\_\_\_\_

Relationship \_\_\_\_\_

Share % \_\_\_\_\_

Check one:  Primary  Contingent

## Beneficiary 1

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Date of birth \_\_\_\_\_

Social Security \_\_\_\_\_

Relationship \_\_\_\_\_

Share % \_\_\_\_\_

Check one:  Primary  Contingent

## Beneficiary 2

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Date of birth \_\_\_\_\_

Social Security \_\_\_\_\_

Relationship \_\_\_\_\_

Share % \_\_\_\_\_

Check one:  Primary  Contingent

## Beneficiary 2

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Date of birth \_\_\_\_\_

Social Security \_\_\_\_\_

Relationship \_\_\_\_\_

Share % \_\_\_\_\_

Check one:  Primary  Contingent

# Investment accounts

## Account 1

Financial institution \_\_\_\_\_

Phone \_\_\_\_\_

Website \_\_\_\_\_

User / Password \_\_\_\_\_

Account \_\_\_\_\_

Check one:  Individual  Joint  other

## Beneficiary 1

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Date of birth \_\_\_\_\_

Social Security \_\_\_\_\_

Relationship \_\_\_\_\_

Share % \_\_\_\_\_

Check one:  Primary  Contingent

## Beneficiary 2

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Date of birth \_\_\_\_\_

Social Security \_\_\_\_\_

Relationship \_\_\_\_\_

Share % \_\_\_\_\_

Check one:  Primary  Contingent

## Account 2

Financial institution \_\_\_\_\_

Phone \_\_\_\_\_

Website \_\_\_\_\_

User / Password \_\_\_\_\_

Account \_\_\_\_\_

Check one:  Individual  Joint  other

## Beneficiary 1

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Date of birth \_\_\_\_\_

Social Security \_\_\_\_\_

Relationship \_\_\_\_\_

Share % \_\_\_\_\_

Check one:  Primary  Contingent

## Beneficiary 2

Name \_\_\_\_\_

Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Date of birth \_\_\_\_\_

Social Security \_\_\_\_\_

Relationship \_\_\_\_\_

Share % \_\_\_\_\_

Check one:  Primary  Contingent

# Life insurance

## Account 1

Insurance company \_\_\_\_\_  
Policy type \_\_\_\_\_  
Phone \_\_\_\_\_  
Website \_\_\_\_\_  
User / Password \_\_\_\_\_  
Account \_\_\_\_\_

## Beneficiary 1

Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Phone \_\_\_\_\_  
Email \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Social Security \_\_\_\_\_  
Relationship \_\_\_\_\_  
Share % \_\_\_\_\_  
Check one:  Primary  Contingent

## Beneficiary 2

Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Phone \_\_\_\_\_  
Email \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Social Security \_\_\_\_\_  
Relationship \_\_\_\_\_  
Share % \_\_\_\_\_  
Check one:  Primary  Contingent

## Account 2

Insurance company \_\_\_\_\_  
Policy type \_\_\_\_\_  
Phone \_\_\_\_\_  
Website \_\_\_\_\_  
User / Password \_\_\_\_\_  
Account \_\_\_\_\_

## Beneficiary 1

Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Phone \_\_\_\_\_  
Email \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Social Security \_\_\_\_\_  
Relationship \_\_\_\_\_  
Share % \_\_\_\_\_  
Check one:  Primary  Contingent

## Beneficiary 2

Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Phone \_\_\_\_\_  
Email \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Social Security \_\_\_\_\_  
Relationship \_\_\_\_\_  
Share % \_\_\_\_\_  
Check one:  Primary  Contingent

# Annuities

## Account 1

Insurance company \_\_\_\_\_  
Policy type \_\_\_\_\_  
Phone \_\_\_\_\_  
Website \_\_\_\_\_  
User / Password \_\_\_\_\_  
Account \_\_\_\_\_

## Beneficiary 1

Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Phone \_\_\_\_\_  
Email \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Social Security \_\_\_\_\_  
Relationship \_\_\_\_\_  
Share % \_\_\_\_\_  
Check one:  Primary  Contingent

## Beneficiary 2

Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Phone \_\_\_\_\_  
Email \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Social Security \_\_\_\_\_  
Relationship \_\_\_\_\_  
Share % \_\_\_\_\_  
Check one:  Primary  Contingent

## Account 2

Insurance company \_\_\_\_\_  
Policy type \_\_\_\_\_  
Phone \_\_\_\_\_  
Website \_\_\_\_\_  
User / Password \_\_\_\_\_  
Account \_\_\_\_\_

## Beneficiary 1

Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Phone \_\_\_\_\_  
Email \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Social Security \_\_\_\_\_  
Relationship \_\_\_\_\_  
Share % \_\_\_\_\_  
Check one:  Primary  Contingent

## Beneficiary 2

Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Phone \_\_\_\_\_  
Email \_\_\_\_\_  
Date of birth \_\_\_\_\_  
Social Security \_\_\_\_\_  
Relationship \_\_\_\_\_  
Share % \_\_\_\_\_  
Check one:  Primary  Contingent

# Savings accounts

## Account 1

Financial institution \_\_\_\_\_

Beneficiary name \_\_\_\_\_

Account number \_\_\_\_\_

Date of birth \_\_\_\_\_

Check one:  Personal savings  College savings plan

Social Security \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Account 2

Financial institution \_\_\_\_\_

Beneficiary name \_\_\_\_\_

Account number \_\_\_\_\_

Date of birth \_\_\_\_\_

Check one:  Personal savings  College savings plan

Social Security \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Account 3

Financial institution \_\_\_\_\_

Beneficiary name \_\_\_\_\_

Account number \_\_\_\_\_

Date of birth \_\_\_\_\_

Check one:  Personal savings  College savings plan

Social Security \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Account 4

Financial institution \_\_\_\_\_

Beneficiary name \_\_\_\_\_

Account number \_\_\_\_\_

Date of birth \_\_\_\_\_

Check one:  Personal savings  College savings plan

Social Security \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Sentinel is headquartered above the noise of Wall Street, in Montpelier, Vermont.

We are an integral part of National Life Group, a mutually-held family of financial service companies with roots dating back to 1848.

Sentinel's range of actively managed mutual funds are designed to find attractive returns through the combination of quantitative analysis and deep fundamental research.

Learn more about Sentinel:

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