



Choosing Your Beneficiaries for your Assets

Many people are **'AT RISK'** of **NOT protecting their money** by not having their Beneficiaries assigned, nor updating or reviewing their Beneficiaries often enough or even at all.

- *Different Types of Assets, where there is a **HUGE NECESSITY** to protect your wishes and your Heirs... should something happen to you and you pass away, where assigning Beneficiaries is an **ABSOLUTE MUST** are: Financial Investments such as: Bank Accounts – Checking & Savings, their Investments such as: 401Ks, 403Bs, 457Bs, Annuities, IRAs, Roth IRAs, as well as Life Insurance Policies, Pensions, other Retirement Accounts, Company Benefit Plans, Brokerage Accounts and more.*

Each Financial Institution and Investment has a means to which you can update your Beneficiaries.

See to it that you do so... sooner than putting it off until later... as later may never come.

If you are **WITHOUT** a Beneficiary on any of your Financial Assets, then your Heirs will need a Lawyer and will need Affidavit(s) drawn up and filed with the Probate Court in order to get access to those funds.

The real wake-up call is that those costs / expenses will be out of your own pocket until you are granted access to your deceased family members accounts / money.