

Step-by-Step Beneficiary Designation Instruction Sheet

Use this instruction sheet to correctly designate beneficiaries for your Accident Insurance policy.

Step 1: Gather Beneficiary Information

1. Collect the following information for each beneficiary:
 - Full Legal Name
 - Date of Birth
 - Relationship to You
 - Percentage to receive (%)

Step 2: Decide Beneficiary Types

1. Choose your beneficiary types:
 - Primary** –“ Receives proceeds first.
 - Contingent** –“ Receives proceeds only if all Primary beneficiaries are unable to do so.

Step 3: Complete the Beneficiary Designation Section

1. Enter collected information for each beneficiary in the form.
2. For multiple beneficiaries, ensure the total % adds up to 100% for each beneficiary type.

Type	Full Name	Date of Birth	Relationship	Percentage
Primary	Jane Doe	01/01/1975	Spouse	100%
Contingent	John Doe Jr.	05/12/2000	Son	100%

Tip: Use legal names to avoid delays or disputes.

Step 4: Sign and Date the Form

1. Review your entries. Sign and date the form according to instructions.

Step 5: Submit Your Form

1. Return your completed, signed form as directed by your insurance provider.

For questions about beneficiary designations, please contact your insurance administrator.