Beneficiary Designations — Page 1

CREATIVE PLANNING

Account Types: Retirement Accounts | 401(k)s, Solo 401(k)s, 403(b)s, 457 and Other Profit-Sharing Plans, Traditional and Roth IRAs, SEP IRAs, and SIMPLE IRAs

Account Type:	Account Registration:	Approximate Value:
Account Number:	Company/Custodian Where Held:	Contact Information:

PRIMARY BENEFICIARIES

Name (First, Middle I, Last or Trust Name)	Relationship	% Share

CONTINGENT BENEFICIARIES

Name (First, Middle I, Last or Trust Name)	Relationship	% Share

Account Type:	Account Registration:	Approximate Value:
Account Number:	Company/Custodian Where Held:	Contact Information:

PRIMARY BENEFICIARIES

Name (First, Middle I, Last or Trust Name)	Relationship	% Share

CONTINGENT BENEFICIARIES

Name (First, Middle I, Last or Trust Name)	Relationship	% Share

Account Type:	Account Registration:	Approximate Value:
Account Number:	Company/Custodian Where Held:	Contact Information:

PRIMARY BENEFICIARIES

Name (First, Middle I, Last or Trust Name)	Relationship	% Share

CONTINGENT BENEFICIARIES

Name (First, Middle I, Last or Trust Name)	Relationship	% Share

Account Types: Life Insurance Policies and Annuities | Term Life, Whole Life, Universal Life, Fixed Annuities, Variable Annuities and Other Insurance Products

Account Type:	Account Registration:	Approximate Value:
Account Number:	Company/Custodian Where Held:	Contact Information:

PRIMARY BENEFICIARIES

Name (First, Middle I, Last or Trust Name)	Relationship	% Share

CONTINGENT BENEFICIARIES

Name (First, Middle I, Last or Trust Name)	Relationship	% Share

Account Type:	Account Registration:	Approximate Value:
Account Number:	Company/Custodian Where Held:	Contact Information:

PRIMARY BENEFICIARIES

Name (First, Middle I, Last or Trust Name)	Relationship	% Share

CONTINGENT BENEFICIARIES

Name (First, Middle I, Last or Trust Name)	Relationship	% Share

Account Type:	Account Registration:	Approximate Value:
Account Number:	Company/Custodian Where Held:	Contact Information:

PRIMARY BENEFICIARIES

Name (First, Middle I, Last or Trust Name)	Relationship	% Share

CONTINGENT BENEFICIARIES

Name (First, Middle I, Last or Trust Name)	Relationship	% Share

This is intended as a personal reference sheet only, official beneficiary designation are listed on your accounts. Please contact your account custodians to confirm your beneficiary information is up to date.

Beneficiary Designations — Page 2

CREATIVE PLANNING

Account Types: Other Employer-Sponsored Plans | Stock Options, Restricted Stock, Deferred Compensation and Defined-Benefit Plans

Account Type:	Account Registration:	Approximate Value:
Account Number:	Company/Custodian Where Held:	Contact Information:

PRIMARY BENEFICIARIES		
Name (First, Middle I, Last or Trust Name)	Relationship	% Share

CONTINGENT BENEFICIARIES		
Name (First, Middle I, Last or Trust Name)	Relationship	% Share

Account Type:	Account Registration:	Approximate Value:
Account Number:	Company/Custodian Where Held:	Contact Information:

PRIMARY BENEFICIARIES		
Name (First, Middle I, Last or Trust Name)	Relationship	% Share

CONTINGENT BENEFICIARIES		
Name (First, Middle I, Last or Trust Name)	Relationship	% Share

Account Type:	Account Registration:	Approximate Value:
Account Number:	Company/Custodian Where Held:	Contact Information:

PRIMARY BENEFICIARIES		
Name (First, Middle I, Last or Trust Name)	Relationship	% Share

CONTINGENT BENEFICIARIES		
Name (First, Middle I, Last or Trust Name)	Relationship	% Share

Account Types: Banking (Payable on Death) and Non-Qualified Investment Accounts (Transfer on Death) | Checking, Savings and Brokerage Accounts

Account Type:	Account Registration:	Approximate Value:
Account Number:	Company/Custodian Where Held:	Contact Information:

PRIMARY BENEFICIARIES		
Name (First, Middle I, Last or Trust Name)	Relationship	% Share

CONTINGENT BENEFICIARIES		
Name (First, Middle I, Last or Trust Name)	Relationship	% Share

Account Type:	Account Registration:	Approximate Value:
Account Number:	Company/Custodian Where Held:	Contact Information:

PRIMARY BENEFICIARIES		
Name (First, Middle I, Last or Trust Name)	Relationship	% Share

CONTINGENT BENEFICIARIES		
Name (First, Middle I, Last or Trust Name)	Relationship	% Share

Account Type:	Account Registration:	Approximate Value:
Account Number:	Company/Custodian Where Held:	Contact Information:

PRIMARY BENEFICIARIES		
Name (First, Middle I, Last or Trust Name)	Relationship	% Share

CONTINGENT BENEFICIARIES		
Name (First, Middle I, Last or Trust Name)	Relationship	% Share

Current Beneficiary Information

CREATIVE PLANNING

Beneficiary #1 Name:	Birth Date/Trust Date:	Relationship:
Address (Street, City, State, ZIP Code):	E-mail Address:	Other:
Telephone Number(s):	SSN/TIN:	

Beneficiary #2 Name:	Birth Date/Trust Date:	Relationship:
Address (Street, City, State, ZIP Code):	E-mail Address:	Other:
Telephone Number(s):	SSN/TIN:	

Beneficiary #3 Name:	Birth Date/Trust Date:	Relationship:
Address (Street, City, State, ZIP Code):	E-mail Address:	Other:
Telephone Number(s):	SSN/TIN:	

Beneficiary #4 Name:	Birth Date/Trust Date:	Relationship:
Address (Street, City, State, ZIP Code):	E-mail Address:	Other:
Telephone Number(s):	SSN/TIN:	

Beneficiary #5 Name:	Birth Date/Trust Date:	Relationship:
Address (Street, City, State, ZIP Code):	E-mail Address:	Other:
Telephone Number(s):	SSN/TIN:	

Beneficiary #6 Name:	Birth Date/Trust Date:	Relationship:
Address (Street, City, State, ZIP Code):	E-mail Address:	Other:
Telephone Number(s):	SSN/TIN:	

(Use additional sheets as needed)