

This form is for informational purposes only. Bensure does not provide legal, financial, or investment advice. Information shared helps our team understand your situation so we can guide you to the right resources.

1. Your Information

Full Name

Email Address

Phone Number

Best Time to Reach You

Date

Are you reaching out for yourself or on behalf of employees/clients?

e.g. Individual / HR Team / Financial Advisor

2. Retirement Accounts

Which types of retirement accounts do you have? (check all that apply)

- IRA (Traditional) IRA (Roth) 401(k) 403(b)
 457 Plan Pension Other

Account Providers / Institutions

e.g. Fidelity, Vanguard, Schwab, Principal, TIAA — list all you are aware of

Do you know who is currently listed as your beneficiary on any of these accounts?

e.g. Yes — my spouse / No — I'm not sure / Varies by account

3. Recent Life Events

Have any of the following occurred in the past 5 years? (check all that apply)

- Marriage Divorce or Separation
 Birth or Adoption of a Child Death of a Beneficiary
 Job Change or Retirement Rollover of 401(k) to IRA
 Remarriage None of the above

Anything else you'd like us to know?

4. Marital Status

Current marital status:

- Single Married Divorced Widowed Domestic Partnership

How did you hear about Bensure?