



Episcopal
Foundation
of Dallas



MONDAY MINUTE

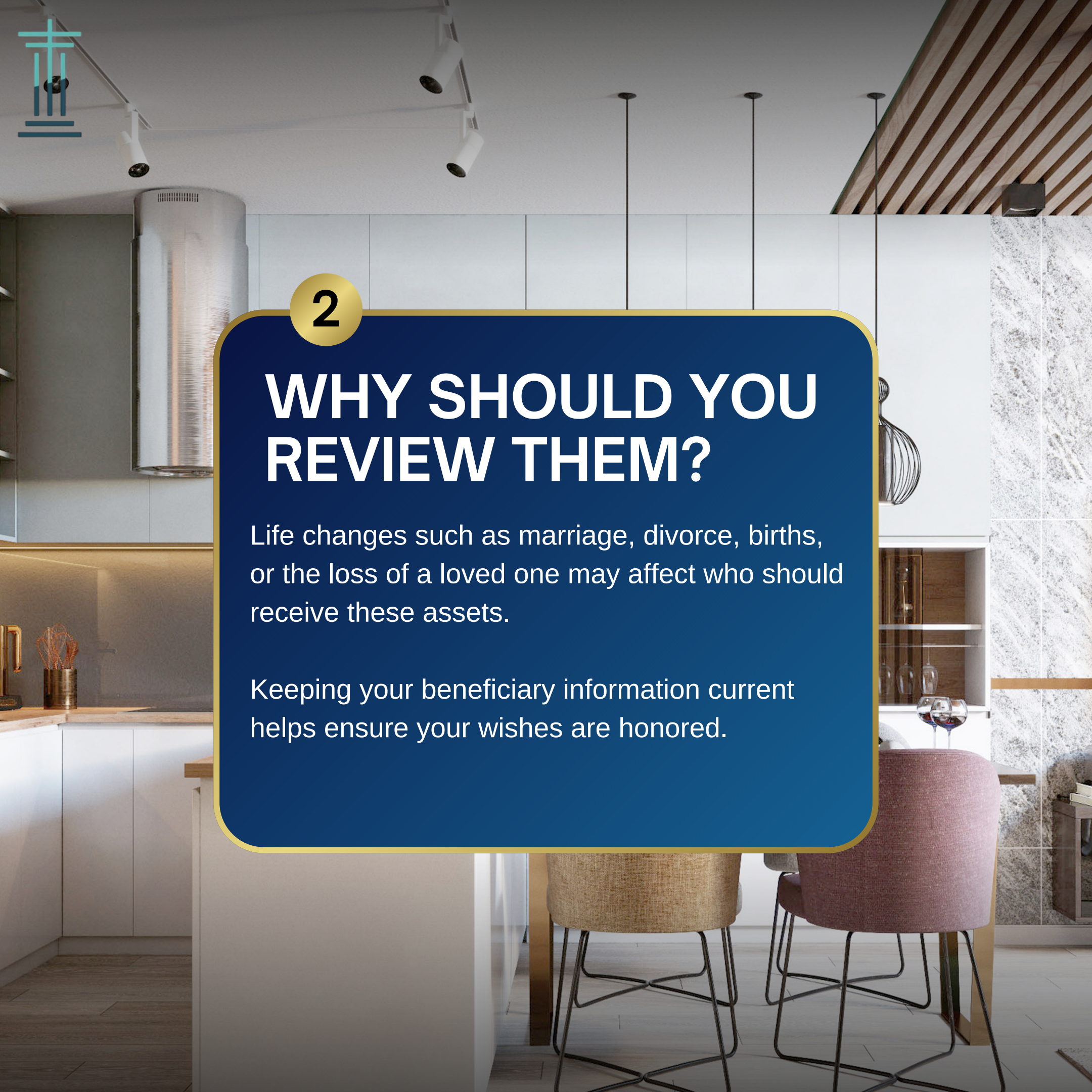




1

DID YOU KNOW?

Beneficiary designations on retirement accounts, life insurance policies, and certain financial accounts typically take precedence over instructions in your will.



2

WHY SHOULD YOU REVIEW THEM?

Life changes such as marriage, divorce, births, or the loss of a loved one may affect who should receive these assets.

Keeping your beneficiary information current helps ensure your wishes are honored.



3

THIS WEEK'S ACTION STEP

Take a few minutes to review all of your beneficiary designations and update them if necessary.

A simple review today can help avoid complications for your loved ones in the future.