



YOUR LONG-TERM CARE SPECIALIST
www.lesltc.com

Toolkit 3 BENEFICIARY

Call or email the companies with your bank investments, banking and life insurance policy to get copies of all the updated beneficiaries information for all assets:

- Copies of your present beneficiaries for toolkit 3 – Put in your toolkit folder
- Also acquire extra change of beneficiary forms
- Address copy of mailing address, phone and emails to help process your claim quickly

** Remember to make sure you have done the correct planning beneficiaries to avoid your money going to Medicaid.

