

Your assignment is to fill in the Schwab beneficiary designation form and the life insurance claim form using the information provided below. Both are for same client with same beneficiary choices. For any information items (eg. addresses, SSNs, etc.) not included in the instructions, you should create your own answers.

IRA Owner and Life Policy Owner and Insured: HUCK PHYNN

Life insurance Policy No. 12910

IRA No. 245OMG

Beneficiaries and shares to each (same for both forms):

Tom Sawyer Phynn, adult son: 35%

Becky Phynn Sawyer, adult daughter: 35%

Mark Twain Phynn, grandson: 15%

Samantha Clemmons Sawyer, granddaughter: 15%