



Kingston

Wealth
Management
Group

Client Beneficiary Review

At Kingston Wealth Management Group, we take pride in building long-term relationships that span generations. Many of our clients have trusted us not only with their own financial planning but also with helping guide their children and grandchildren toward a secure financial future.

As life changes and estate planning becomes increasingly important, **now may be an ideal time to introduce us to your beneficiaries.** These conversations can provide clarity, align family goals, and ensure a smooth transition of wealth and values. We're here to support your family every step of the way—today and for generations to come.

*Please complete the below fields so we can ensure your beneficiaries are up-to-date in our system.
*We will not contact your beneficiaries**

Beneficiary 1:

Beneficiary Name: _____ Beneficiary Date of Birth: _____
Beneficiary Address: _____
Beneficiary Email: _____ Beneficiary Phone: _____
Beneficiary Gender: _____ Beneficiary Relationship: _____
Account Type: _____ Allocation Amt. _____

Beneficiary 2:

Beneficiary Name: _____ Beneficiary Date of Birth: _____
Beneficiary Address: _____
Beneficiary Email: _____ Beneficiary Phone: _____
Beneficiary Gender: _____ Beneficiary Relationship: _____
Account Type: _____ Allocation Amt. _____

Beneficiary 3:

Beneficiary Name: _____ Beneficiary Date of Birth: _____
Beneficiary Address: _____
Beneficiary Email: _____ Beneficiary Phone: _____
Beneficiary Gender: _____ Beneficiary Relationship: _____
Account Type: _____ Allocation Amt. _____

Additional Notes: