



## Life Event Planning Checklist

### Having Children

- Add Child to Your Health Insurance
- Make Sure to Keep an Ongoing Copy of What Immunizations Your Child Has Received
- Consider a Flex Plan
- Check Accounts to See if Beneficiary Designations Should be Updated
- Create New Retirement Plan
- Make Sure All Estate Documents are Updated
- Consider a Trust
- Review Education Saving Accounts
- Update W4
- Review Life Insurance
- Disability Insurance Review (If There is a Need)
- Review all of these items with your financial advisor

