

Life Event Planning Checklist

Newly Widowed

- Notify Social Security Administration
- Is POA and Health Care Agent in Place?
- Confirm Caregiver Plan in Place
- Review Cash Flow and Emergency Funds Available
- Assess Updated Cash Flow
- Transfer of Assets Jointly Held
- Claim Insurance, Retirement Accounts, Annuities, Social Security Benefits
- Revise All Estate Documents (Will, POAs, Health Care Proxy, Living Will)
- Review Life Insurance
- Health Insurance Review
- Make Sure All Money and Benefits have been Reviewed
- Review all of these with your financial advisor

