Celebrating Over 30 Years...

...and Supporting You for the Next 30

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Life Event Planning Checklist: Having Children

- Add children to your health insurance
- O Make sure to keep an ongoing copy of what immunizations your child has received
- O Consider a flex plan
- Check accounts to see if beneficiary designations should be updated
- O Create new retirement plan
- O Make sure all estate documents are updated
- O Consider a trust
- O Review educations saving accounts
- O Update W4
- O Review life insurance
- O Disability insurance review (If there is a need)
- O Review all of these items with your financial advisor

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