

**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
- 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