## **Celebrating Over 30 Years...**

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...and Supporting You for the Next 30

John "Goose" Dunham Comprehensive Wealth Planner

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## **Life Event Planning Checklist: Newly Widowed**

$\cup$	Notify Social Security administration
$\bigcirc$	Is POA and health care agent in place?
$\bigcirc$	Confirm caregiver plan in place
$\bigcirc$	Review cash flow and emergency funds available
$\bigcirc$	Assess updated cash flow
$\bigcirc$	Transfer of assets jointly held
$\bigcirc$	Claim insurance, retirement accounts, annuities, Social Security benefits
$\bigcirc$	Revise all estate documents (Will, POAs, Health Care Proxy, Living Will)
$\bigcirc$	Review life insurance
$\bigcirc$	Review health insurance
$\bigcirc$	Make sure all money and benefits have been received
$\bigcirc$	Review all of these items with your financial advisor

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