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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
- ◯ Review health insurance
- ◯ Make sure all money and benefits have been received
- ◯ Review all of these items with your financial advisor