

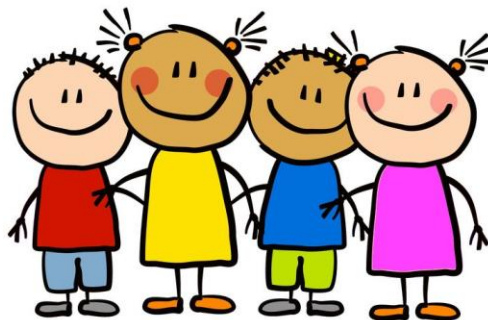


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Life Event Planning Checklist

Having Children

- Add Child 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



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