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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 & 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
- Health Insurance Review
- Make Sure All Money and Benefits have been Received
- Review all of these items with your financial advisor



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