

# Life Events Checklist

## What's on your mind?

Concerns about your personal life and your financial responsibilities often intersect. By planning for life events that have an impact on your financial goals, you can make solid decisions to help reduce your worries.

Please use this checklist to help identify areas of concern. Then, send it to us or contact us to receive additional information or guidance.

### LIFE EVENTS

- What happens to my 401k when I change jobs?
- What are my options if I am laid off?
- I'm getting divorced, what happens to my assets?
- What do I do when a loved one dies?

### RETIREMENT

- How do I manage all my retirement plans?
- Will my money last through retirement?
- What are my IRA options?
- Do I have a retirement income/distribution plan?

### ESTATE PLANNING

- What should I know about estate planning?
- Will my family be secure if something happens to me?
- Are my beneficiaries up to date?
- How do I create a legacy for my children?

### ELDER CARE

- How does Medicare work?
- What should I look for in a care facility?
- What happens if I have to care for my parents?

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Best Time to Call: \_\_\_\_\_

Email: \_\_\_\_\_

### EDUCATION PLANNING

- How much should I save?
- What are my college savings options?
- Will I qualify for financial aid?

### INSURANCE NEEDS

- Is my life insurance coverage adequate?
- Are annuities a good option?
- Do I need Long Term Care Insurance?

### GENERAL FINANCES

- How do I keep my records safe and organized?
- Should I consider tax-advantaged investing?
- How do I teach my children about money?
- Can I consolidate debt and or assets?
- What strategy should I use for company stock?

Other Concerns?: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

We value the trust and confidence that you put in us, and we look forward to discussing any events that may impact your financial goals or plans. We will contact you once we receive your checklist.

Warmest Regards,

**Joseph Grella, CFP® and William D'Annibale**  
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