



Snapshots™

DEATH OF A LOVED ONE: FINANCIAL CHECKLIST

THE DEATH OF YOUR SPOUSE OR A LOVED ONE CAN MEAN CHANGES IN YOUR LIFE AND YOUR LIFE GOALS.

I will be pleased to help you with strategies and advice for balancing your priorities and making progress towards achieving your financial goals. Let's discuss the following questions:

- How do I transfer my spouse's investment assets into my name and what documents will I need?
- Will I need to create a new investment portfolio?
- Do I need a new Will?
- How will my estate plans change?
- Should I consider transferring assets to my family now?
- How will my budget change?
- I may decide to sell my home, what are the implications?
- Will I need new or different insurance coverage?
- What is involved in being an Executor?

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