



TOP 6 THINGS

every woman should consider
AFTER the death of her spouse:

1. Update beneficiary information.

Anytime there is a life changing event, beneficiary forms should be reviewed to ensure all are up-to-date and no changes need to be made.

2. Don't put off important conversations.

As hard as it may be, now is the time to discuss your wishes with children or other loved ones.

Make sure you have a health care directive in case of tragedy that doesn't result in your death.

3. Consolidate your financial records.

Consider account numbers, contact info, Social Security numbers, passwords, maiden names, secret keys or passcodes to accessing online information.

4. Consult a financial advisor to ensure your assets are structured to pass the maximum amount of legacy to your heirs.

As the only living parent, your death will trigger the benefits to primary and contingent beneficiaries.

Don't miss out on opportunities that will be gone once you have passed.

5. Have a list of whom to notify in the event of your death.

Consider friends, organizations, and others who should be called.

Now is also the time to decide if you want an obituary to run in any major newspapers and what information you would like to share.

6. Update your travel information.

If you will be travelling away from home, make sure you always take important info with you, including copy of health insurance, any medicines you take, contact information for family members, etc.



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