

# 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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