

# Life Events Checklist

Change is a constant part of life. In order to determine how we may best serve you, please complete the form below and return it to us at your earliest convenience.

## Common Life Events

- New child or grandchild
- New job or promotion
- Receipt of an inheritance
- Major investment gain/loss
- Health concerns
- Change in marital status
- Change in estate plan
- Sale or purchase of home
- Start/purchase a business
- Sold or acquired assets
- Death of family member
- New investments or insurance
- Retirement
- Gain/loss of business partner
- Other: \_\_\_\_\_

## Areas of Interest or Concern

- Retirement planning
- Estate planning
- Major asset purchase/lease
- Business/exec. benefits
- Personal property/liability ins.
- Education funding
- Income tax planning
- Planning for parents
- Business continuation
- Disability income
- Investment review
- Survivor benefit planning
- Health/LTC planning
- Charitable giving
- Other: \_\_\_\_\_

## Additional Comments and Notes

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## Contacting You

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

Telephone: \_\_\_\_\_ Best time to call: \_\_\_\_\_

Please contact me as soon as possible Email: \_\_\_\_\_



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