



THINGS TO CONSIDER:

Things A Surviving Spouse Needs To Know

The transition period after the death of a spouse is a time when weighty financial decisions about the rest of your life, and possibly your children's lives, will have to be considered and carried out.

Find out what urgent financial matters need to be addressed immediately and what less pressing issues can wait.

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1 THINGS TO DO RIGHT AWAY

- Meet with a Financial Planner or CPA before the end of the tax year
- Notify credit bureaus not to issue credit in their name
- If they had IRA accounts that had RMD's due for this year, take them

2 THINGS YOU WILL NEED TO UPDATE

- Wills and Trusts
- Life insurance policies where they were the beneficiary
- Life insurance policies where they were the insured
- Health insurance if you were on the deceased spouse's plan
- Mortgage documents (just the statement will suffice)
- Car titles

3 DOCUMENTS YOU WILL NEED

- Marriage certificate and birth certificate of your spouse
- Death certificate (make 10-20 copies)
- Individual credit cards statement/balances

4 NUMBERS AND STATEMENTS YOU WILL WANT ON HAND

- Tax returns for the last two years
- Current bills
- Investment account statements
- Bank statements
- Retirement plan statements

To learn more about the financial steps you should take after losing your spouse, scan the QR code here.



YOUR NEXT STEPS

Book your Next Steps meeting at



TalktoFEG@YourLifeAfterWork.com



(800) 928 - 4001



www.YourLifeAfterWork.com



We help reduce financial regrets, and few issues are more regrettable than simple strategies that were overlooked and are no longer an option.

Your beneficiaries and your spouse will thank you for investing your time.

*From Our Family to **Yours**, Thank You!*



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