Life Stage Changes Checklist

Over the past year, have any of the following happened?

Family	Yes/No	Who	Does It Impact Your Goals?	Does It Impact Your Will, Life Insurance or Trusts?	Does It Change a Beneficiary?
Birth/Adoption					
Death					
Marriage					
Separation					
Divorce					
Start or Graduate From College					

Change in Health	Yes/No	Description	Does It Impact Your Goals?	Does It Impact Your Will, Life Insurance or Trusts?	Does It Change a Beneficiary?
You					
Spouse/Partner					
Dependent					
Other Close Relative					

Employment (You or Spouse/Partner)	Yes/No	Description	Does It Impact Your Goals?	Does It Impact Your Will, Life Insurance or Trusts?
New Job				
Change in Compensation				
Job Loss				
Retirement				

Housing	Yes/No	Description	Does It Impact Your Goals?	Does It Impact Your Will, Life Insurance or Trusts?
Bought/Sold Residence				
Reverse Mortgage (New/Borrowed From)				
Move Into Retirement Community				
Bought/Sold Vacation Home				

Change in Wealth	Yes/No	Description	Does It Impact Your Goals?	Does It Impact Your Will, Life Insurance or Trusts?
Inheritance				
Portfolio Returns				
Bought/Sold Business				
Other Big Influx/Outflow				

Inventory of Key Estate Planning Information

Beneficiaries*	
Account	**Names**

**Check against the Investment Account Inventory List:*
https://www.aaii.com/latest/article/12932-a-worksheet-for-listing-all-of-your-investment-accounts

Financial and Estate Planning Professionals		
Type	**Name**	**Phone Number and Email**

Doctors**		
Type	**Name**	**Phone Number and Email**

Life Insurance Policies			
Type	**Company**	**Policy Number**	**Phone Number and Website**

Pensions and Annuities			
Type	**Company**	**Pension/Contract Number**	**Phone Number and Website**

Wills and Trust Documents		
Type	**Location**	**Date of Last Update**

Funeral Arrangements**		
Type	**Funeral Home/Cemetery**	**Phone Number and Website**

Digital Accounts		
Type	**Username/Password**	**URL**

Other Documents**	
Type	**Location**
Military ID/Discharge Papers	
Personal Contacts	
Final Wishes	
House Title	
Vehicle Titles	
Other	

***Though not tied to your investments, heirs may appreciate having this information included.*