Facing the Road Ahead

First Steps When You've Lost Your Spouse

Here are some of the steps you should take as early as possible. Think about locating two accordion file folders: One will hold documents for and from your attorney; the other will hold documents for and from your financial advisor.

Then begin gathering personal and financial data pertaining to you and your spouse.

You and Your Spouse

- [ ] Names and birthdates
- [ ] Wedding date
- [ ] Social Security numbers

Employent / Business

- [ ] Annual salary
- [ ] List of retirement accounts
- [ ] List of pensions/annuities

Online

- [ ] Set up your Social Security login
- [ ] Set up your IRS login

Net Worth

- [ ] List of what you own
    - Home, land, vehicles, collections
- [ ] List of what you owe
    - Mortgage, loans, credit cards

Children / Grandchildren

- [ ] Names and birthdates
- [ ] List of investment accounts
- [ ] List of college accounts

Accounts

- [ ] Checking and savings accounts
- [ ] Brokerage and investment accounts
- [ ] Trusts

Taxes

- [ ] Recent tax return
- [ ] CPA contact information

Documents

- [ ] Wills
- [ ] Insurance policies

Now, don't worry if you don't have some of the above items, or even if you don't know where to find them! **We're here to walk through this with you.** We'll help you pull together everything you need and organize it so you'll be ready for each step in the process.

While all the above are necessary, please remember to make time and create space for self-care — **make it a priority** — both financially and in your calendar. This intentional investment will be a source of energy and strength as you walk through this stressful season of life.

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