HOW IT'S DONE

Life Transitions Checklist

What happens in your life has an impact on your finances.

By knowing the timing of events in people's lives you may be able to help them with the financial side of the transition. It is possible that one of the following transitions will take place for you, or someone you know during the next 12 months? When meeting or talking with a client, find out which of the following transitions are on their radar.

Timelines	Event	Timelines	Event
	Marriage		Spouse begins or stops work
	Birth of a Child or Grandchild		Relocation for a New Job
	Divorce		Start-Up New Business
	Death of a Spouse		Losing Job or Failure of Business
	Remarriage		Leaving Employment at Retirement
	Children go to College		Selling Business
	Last Child Leaves Home		Selling Home
	Child Marries		Relocation for Retirement
	Adult Child Divorces or Child's Spouse Dies		Disability or Chronic Illness of Self or Spouse
	Remarriage of Adult Children		Disability or Chronic Illness of Parent/Grandparent
	Purchase of Home		Disability or Chronic Illness of Adult Child
	Leaving a Legacy		Death of Parent/Grandparent
	Receiving an Inheritance		Relocation to Assisted Care Facility
	New Employer/New Career		

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