



65 EVENTS THAT SHOULD GET YOU THINKING ABOUT ESTATE PLANNING

Personal/Family

1. Getting married
2. Going through a divorce or separation
3. Recent loss of your spouse (widowhood)
4. Expecting a child
5. Recent birth of a child
6. Adopting a child
7. Need to hire childcare
8. Child entering adolescence
9. Child with special needs
10. Child preparing for college
11. Child going away to college
12. Child getting married
13. Child experiencing legal or financial difficulty
14. Adult child experiencing marital difficulty
15. Empty nest
16. Special family event
17. Providing financial or other assistance to a family member
18. Concerned about an aging parent
19. Concerned about the health of a spouse or child
20. Concerned about personal health
21. Family member in need of professional care
22. Family member with disability or serious illness
23. Family member expected to die soon
24. Recent death of a family member
25. Extended, frequent or overseas travel
26. Entering single parenthood
27. Family member with special needs

Work/Career

28. Contemplating a career change
29. New job
30. Job promotion
31. Job loss
32. Job restructuring
33. New job training or education program
34. Starting a new business

35. Gaining or losing a business partner
36. Selling or closing a business
37. Transferring business to family member
38. Downshift/simplify work life
39. Taking a sabbatical or leave of absence
40. Phasing into retirement
41. Full retirement from current job
42. Buying an existing business
43. Expanding an existing business

Financial/Investment

44. Selling a house
45. Refinancing mortgage
46. Purchasing a home
47. Relocating
48. Reconsidering investment philosophy
49. Significant investment gain
50. Significant investment loss
51. Concerned about debt
52. Considering an investment opportunity
53. Purchasing or changing life insurance
54. Receiving an inheritance or financial windfall
55. Selling assets
56. Considering changing financial service provider

Community/Charitable

57. Monthly stipend to parents (parental pension)
58. Gifting to children or grandchildren
59. Develop or review an estate plan
60. Develop an end of life plan
61. Creating or funding a foundation
62. Creating or funding a scholarship fund
63. Desire to give to community causes or events
64. Desire to give to church/religious organizations
65. Desire to give to other charitable organization