



DENVER

WEALTH MANAGEMENT

Your Checklist for Terminal Illness

(303) 261-8015 | www.denverwealthmanagement.com

Update Your Paperwork ✓

.....

We understand this may be a tough time in your family's life. Hopefully this checklist can help you best address your financial future.

- Update your will.
- Update your beneficiaries.
- Write a legacy letter.
- Last chance at making or completing a bucket list.

Thing to Help Your Family ✓

.....

Discuss the financial situation with your family members in order to ensure everyone is on the same page.

- Explore tax deductions for costs not covered by insurance.
- Have a conversation with your family regarding your financial affairs.
- Make decisions for family so they won't have to so.