



Wealth is the ability to fully experience life.

Financial Windfall/Inheritance

Receiving a financial windfall or inheritance can drastically improve your financial situation, but many people misspend the money because they don't have a specific plan. Addressing the critical steps on this checklist can help you maximize your newfound asset and put you on secure financial footing.

KEY PLANNING STEPS

- | | |
|---|--|
| <input type="checkbox"/> Tax planning | <input type="checkbox"/> Charitable giving |
| <input type="checkbox"/> Debt review and planning | <input type="checkbox"/> Goals and big purchase planning |
| <input type="checkbox"/> Emergency fund | <input type="checkbox"/> Investment strategy |
| <input type="checkbox"/> Retirement planning | <input type="checkbox"/> Asset structure |
| <input type="checkbox"/> Estate planning | <input type="checkbox"/> Titling of assets |

LEGAL DOCUMENTS

- | | |
|---|--|
| <input type="checkbox"/> Transferring inherited assets <i>(if applicable)</i> | <input type="checkbox"/> Review/update beneficiaries |
| <input type="checkbox"/> Review/update estate planning documents | |

NOTES

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