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Partnering for Living Solutions

# Essential Legal & Financial Contacts for Life Transitions

Stay organized and informed by keeping these key legal and financial details at your fingertips.

## Legal Contacts

- Identify an estate or probate attorney
- Confirm legal representation for contract review
- Keep copies of wills, trusts, and deeds in one place
- Understand probate court requirements

## Financial Advisors

- Select a financial planner familiar with transitions
- Review your current investment portfolio
- Discuss strategies for managing inheritance or proceeds
- Understand tax implications with a CPA

## Documentation

- Collect all property-related financial documents
- Ensure insurance policies are current
- Keep a list of account numbers and institutions
- Secure passwords for financial accounts