LIFE TRANSITION PARTNERS

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