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# Life events: death of a loved one

## Financial checklist

The death of your spouse or a loved one can mean changes in your life and your life goals. An advisor can help with strategies and advice for balancing your priorities and making progress towards achieving your financial goals. Take this opportunity to review your priorities and consider some of these questions:

- How do I transfer my spouse's investment assets into my name and what documents will I need?
- Will I need to create a new investment portfolio?
- Do I need a new Will?
- How will my estate plans change?
- Should I consider transferring assets to my family now?
- How will my budget change?
- I may decide to sell my home, what are the implications?
- Will I need new or different insurance coverage?
- What is involved in being an Executor

**Allowing an advisor to assist during this challenging time can lighten your burdens considerably. Please call us today to discuss.**

RBC Dominion Securities Inc.