

Life Event Inserts

Some changes can't wait for the annual review. When something major happens, fill in the matching insert below and attach it to the right section, so your organizer updates instantly without rewriting whole chapters.

Your Life Event Inserts

Fill one in each time a major life event happens, so updates never pile up.

INSERT 1: NEW CHILD OR GRANDCHILD

DATE OF BIRTH

CHILD'S NAME

RELATIONSHIP / PARENTS

UPDATES NEEDED & ACTION TAKEN

INSERT 2: MARRIAGE OR NEW RELATIONSHIP

Getting married can affect an existing Will, and in some states it changes things automatically, so it's a good moment to have the lawyer review your Will and confirm it still does what you want.

DATE

SPOUSE / PARTNER NAME

CERTIFICATE / PRENUP LOCATION

UPDATES NEEDED & ACTION TAKEN

INSERT 3: DIVORCE OR SEPARATION

DATE

FORMER SPOUSE / PARTNER

SETTLEMENT / ORDERS LOCATION

UPDATES NEEDED & ACTION TAKEN

Your Life Event Inserts (cont.)

INSERT 4: PROPERTY PURCHASE OR SALE

DATE	PROPERTY ADDRESS
BOUGHT OR SOLD	UPDATES NEEDED & ACTION TAKEN

INSERT 5: BANK ACCOUNT OR INVESTMENT CHANGE

DATE	ACCOUNT / INVESTMENT
OPENED OR CLOSED	UPDATES NEEDED & ACTION TAKEN

INSERT 6: JOB CHANGE OR RETIREMENT

DATE	DETAILS
RETIREMENT SAVINGS / INSURANCE CHANGES	UPDATES NEEDED & ACTION TAKEN

INSERT 7: MAJOR MEDICAL EVENT

DATE	DETAILS
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Your Life Event Inserts (cont.)

UPDATES NEEDED & ACTION TAKEN

INSERT 8: BUSINESS STARTED OR CLOSED

DATE

BUSINESS

STARTED OR CLOSED

UPDATES NEEDED & ACTION TAKEN

INSERT 9: DEATH OF A BENEFICIARY

DATE

WHO

UPDATES NEEDED & ACTION TAKEN

INSERT 10: MOVED HOUSE

DATE

NEW ADDRESS

UPDATES NEEDED & ACTION TAKEN

Your Life Event Inserts (cont.)

ADDITIONAL LIFE EVENT NOTES