

*Call QuatriniRafferty for  
The Legal Checkup™, our  
unique approach to your  
lifetime legal needs.*

**888-288-9748**

| Life Event                   | Your Legal Checkup  |
|------------------------------|---|
| BIRTH / ADOPTION             | <ul style="list-style-type: none"> <li><input type="checkbox"/> Prepare a will</li> <li><input type="checkbox"/> Appoint a guardian</li> <li><input type="checkbox"/> Gifts to minors</li> <li><input type="checkbox"/> Placing assets in trust</li> <li><input type="checkbox"/> Changing beneficiaries, insurance policies, annuities, pensions, etc.</li> </ul>  |
| MARRIAGE                     | <ul style="list-style-type: none"> <li><input type="checkbox"/> Revise deed(s) to all real estate</li> <li><input type="checkbox"/> Revise will</li> <li><input type="checkbox"/> Change/add married name on documents, bank accounts, charge accounts, etc.</li> <li><input type="checkbox"/> Name change and/or adoption of stepchildren</li> <li><input type="checkbox"/> Power of attorney</li> <li><input type="checkbox"/> Change beneficiaries on insurance</li> <li><input type="checkbox"/> Create a living will</li> <li><input type="checkbox"/> Prepare a prenuptial agreement</li> </ul> |
| PURCHASE OF REAL ESTATE      | <ul style="list-style-type: none"> <li><input type="checkbox"/> Preparation or review of agreement of sale</li> <li><input type="checkbox"/> Local municipal regulations</li> <li><input type="checkbox"/> Financing</li> <li><input type="checkbox"/> Tax consequences</li> <li><input type="checkbox"/> Title search</li> <li><input type="checkbox"/> Representation at closing</li> </ul>   |
| SUBSTANTIAL CHANGE IN ASSETS | <ul style="list-style-type: none"> <li><input type="checkbox"/> INCREASE: gifts, tax planning, estate planning, credit rating repair, size of estate</li> <li><input type="checkbox"/> DECREASE: negotiate with creditors, bankruptcy, modify support, unemployment benefits, administrative benefits</li> </ul>  |

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| RELOCATION TO ANOTHER RESIDENCE | <ul style="list-style-type: none"> <li><input type="checkbox"/> Lease or real estate purchase</li> <li><input type="checkbox"/> Change driver's license and registration</li> <li><input type="checkbox"/> Register business/professional licenses</li> <li><input type="checkbox"/> Update voter registration information</li> <li><input type="checkbox"/> Review will</li> </ul>                           |
| CRIMINAL CHARGES                | <ul style="list-style-type: none"> <li><input type="checkbox"/> Contact attorney immediately</li> <li><input type="checkbox"/> Possible insurance coverage</li> <li><input type="checkbox"/> Protect driving license</li> <li><input type="checkbox"/> Protect professional license</li> </ul>  |
| VICTIM OF CRIME                 | <ul style="list-style-type: none"> <li><input type="checkbox"/> File civil suit</li> <li><input type="checkbox"/> Make crime victim compensation claim</li> </ul>   |
| SERIOUS INJURY OR ILLNESS       | <ul style="list-style-type: none"> <li><input type="checkbox"/> Health insurance benefits</li> <li><input type="checkbox"/> Examine limits of liability insurance</li> <li><input type="checkbox"/> File social security disability or SSI claim</li> <li><input type="checkbox"/> File long-term disability claim</li> <li><input type="checkbox"/> Estate planning</li> </ul>                               |
| PURCHASE OR LEASE OF AUTOMOBILE | <ul style="list-style-type: none"> <li><input type="checkbox"/> Full tort coverage</li> <li><input type="checkbox"/> Underinsurance/uninsurance coverage</li> <li><input type="checkbox"/> Stacking of UIM/UM benefits</li> <li><input type="checkbox"/> Loss of income benefits</li> </ul>   |
| AUTOMOBILE OR OTHER ACCIDENT    | <ul style="list-style-type: none"> <li><input type="checkbox"/> Obtain necessary medical care</li> <li><input type="checkbox"/> Take photographs</li> <li><input type="checkbox"/> Identify witnesses</li> <li><input type="checkbox"/> No contact with other parties or their insurance companies</li> </ul>   |
| INJURED WHILE WORKING           | <ul style="list-style-type: none"> <li><input type="checkbox"/> Notify employer immediately</li> <li><input type="checkbox"/> File workers' compensation claim</li> <li><input type="checkbox"/> File social security disability claim</li> <li><input type="checkbox"/> Protect health insurance benefits</li> </ul>   |
| DIVORCE                         | <ul style="list-style-type: none"> <li><input type="checkbox"/> Revise will</li> <li><input type="checkbox"/> Revise deed(s) to all real estate</li> <li><input type="checkbox"/> Change title on motor vehicles</li> <li><input type="checkbox"/> Change beneficiaries in will, pensions, insurance policies, annuities, etc.</li> <li><input type="checkbox"/> File for resumption of prior name</li> </ul> |

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|-------------------------------|---|
| BUSINESS STATUS CHANGES       | <ul style="list-style-type: none"> <li><input type="checkbox"/> Form or dissolve: partnership, corporation, fictitious name</li> <li><input type="checkbox"/> Obtain professional licenses</li> <li><input type="checkbox"/> Secure federal and sales tax i.d. numbers</li> <li><input type="checkbox"/> Examine zoning requirements</li> <li><input type="checkbox"/> Consult tax attorney and accountant</li> </ul>   |
| DEATH OF SPOUSE/FAMILY MEMBER | <ul style="list-style-type: none"> <li><input type="checkbox"/> Probate</li> <li><input type="checkbox"/> Review estate plan</li> <li><input type="checkbox"/> Revise will and power of attorney</li> <li><input type="checkbox"/> Change beneficiaries in will, pension, insurance policies, annuities, etc.</li> <li><input type="checkbox"/> Consider gifts to children</li> </ul>   |
| HOME ALTERATIONS              | <ul style="list-style-type: none"> <li><input type="checkbox"/> Municipal regulations</li> <li><input type="checkbox"/> Zoning</li> <li><input type="checkbox"/> Permits</li> <li><input type="checkbox"/> Liens</li> </ul>   |
| FINANCES                      | <ul style="list-style-type: none"> <li><input type="checkbox"/> Taxes</li> <li><input type="checkbox"/> Income management</li> <li><input type="checkbox"/> Reassessment</li> </ul>   |
| AGING PARENTS                 | <ul style="list-style-type: none"> <li><input type="checkbox"/> Conversation with parents about long-term care</li> <li><input type="checkbox"/> Long-term care insurance</li> <li><input type="checkbox"/> Long-term care facility</li> <li><input type="checkbox"/> Review wills/power of attorney</li> <li><input type="checkbox"/> Consider transfer of real estate</li> <li><input type="checkbox"/> Create or review estate plan</li> </ul>   |
| RETIREMENT                    | <ul style="list-style-type: none"> <li><input type="checkbox"/> Dissolution or transfer of business</li> <li><input type="checkbox"/> Pension options</li> <li><input type="checkbox"/> Social Security retirement options</li> <li><input type="checkbox"/> Estate planning</li> <li><input type="checkbox"/> Review power of attorney</li> <li><input type="checkbox"/> Review will</li> </ul>  |
| ESTATE PLANNING               | <ul style="list-style-type: none"> <li><input type="checkbox"/> Review will</li> <li><input type="checkbox"/> Create or locate living will</li> <li><input type="checkbox"/> Examine power of attorney</li> <li><input type="checkbox"/> Examine all other legal documents</li> <li><input type="checkbox"/> Gather all financial and personal data</li> <li><input type="checkbox"/> Create complete plan for all assets</li> <li><input type="checkbox"/> Examine lifetime gifts to children</li> <li><input type="checkbox"/> Guardianship for minor children</li> </ul> |