John Hancock
the future is yours

Life Events Checklist

Below are common life events that you will want to share with your financial adviser.
Together, you can determine and select the best ways to keep your long-term goals on track.

Your and your family

- [ ] Marriage for the first time
- [ ] Divorce
- [ ] Remarriage
- [ ] Birth or adoption of a child/grandchild
- [ ] Your child starts high school
- [ ] Your child starts college
- [ ] Your child graduates from college
- [ ] Your child reaches the age of majority (18 or 21 depending upon your state)
- [ ] Your child marries
- [ ] Your child divorces

Finances

- [ ] You or a beneficiary receive an inheritance, a settlement or a financial windfall
- [ ] You experience a major investment gain or loss
- [ ] You establish a trust
- [ ] You buy or sell a home
- [ ] You receive a new insurance policy
- [ ] You become the legal guardian for another person
- [ ] You discover an old life insurance policy that hasn't been reviewed in a long time
- [ ] and/or mutual funds that you forgot
- [ ] You or your spouse receive Social Security

Work

- [ ] You or your spouse gets a new job
- [ ] You or your spouse loses a job
- [ ] You start or buy a business
- [ ] You gain or lose a business partner
- [ ] Your company changes retirement plans or insurance providers
- [ ] You or your spouse retire

Health

- [ ] Incapacitation or illness affects you, your spouse or a beneficiary
- [ ] You encounter health concerns
- [ ] A beneficiary dies

When you look to the future, you can count on your financial adviser to support you every step of the way.