

Quick List:

# Financial Windfall

When you receive a financial windfall, review the following sections and cross out each option once completed.



## 1. Evaluate:

The source of windfall

Lump sum or annuity payout

Amount of payout

## 2. Prepare a Team:

Find a trusted attorney

Hire a skilled CPA

Consider a Certified Financial Planner (CFP®)

Incorporate a real estate or insurance professional

## 3. Analyze your Options:

Save for retirement

Purchase something new

Fund a 529 education plan

Consider philanthropy/gift

Invest

## 4. Review:

Your current Will and Estate Plan to make any necessary changes

## 5. Update:

Your insurance policies, and increase your umbrella policy to include new funds



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*Currency fluctuates. Value does not.*