



Paper LIFESAVERS

Simple, easy to follow steps that take the overwhelm out of finances before and after major life events.

Your Amazing Itty Bitty®

“Before” Financial Checklist Book

15 Important Actions to Complete
Before the Loss of a Loved One



Marie
Certified

Your Amazing Itty Bitty®

“After” Financial Checklist

15 Important Steps to Take Care
of After the Loss of a Loved One



Marie Burns, CFP®

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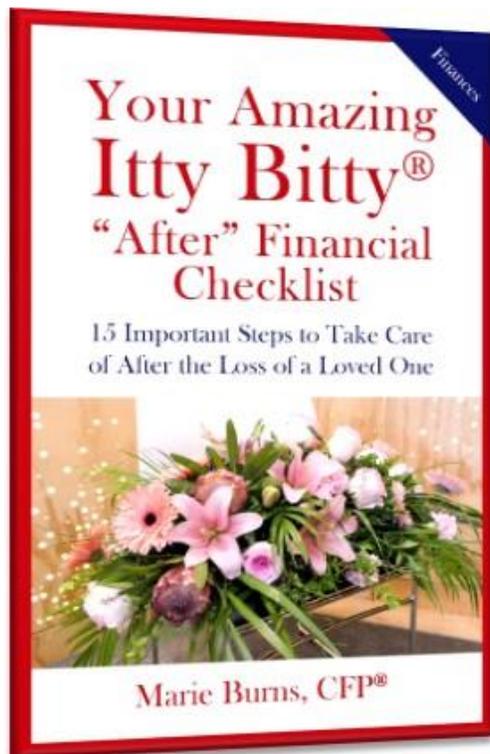
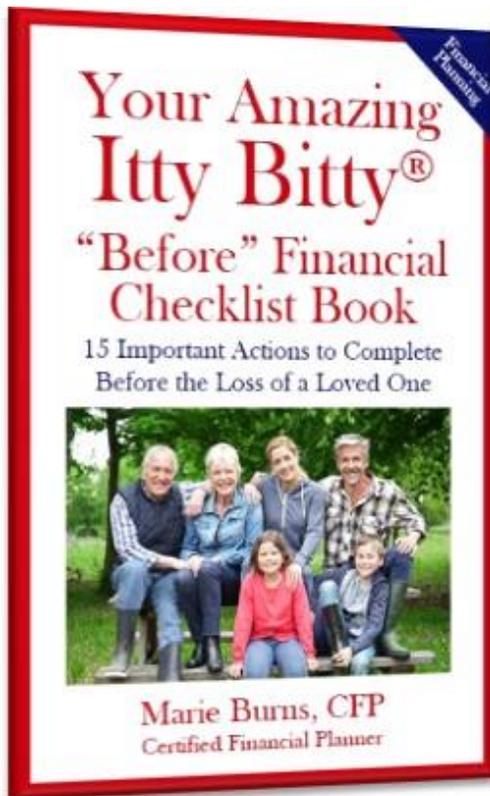
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Author Bio

Marie Burns, a Certified Financial Planner™ (CFP®) with insurance and securities licenses, has been advocating for clients as a financial advisor for close to 20 years. She is a member of the Financial Planning Association nationally and locally, 100+ Women Who Care, Ahwatukee Foothills Friends and Neighbors, and Mountain Park Church. Originally from Wisconsin, she has helped clients with their financial lives in a bank setting, accounting firm, at Vanguard, at a financial planning firm and now enjoys her own practice with an independent Registered Investment Advisory firm. She enjoys cooking, reading, walking, hiking, Zumba and especially creating memories with family and friends.





Book Bio

These Itty Bitty Books provide 15 steps that will help you update your financial records before you're gone, walk you through important actions on financial steps after the loss of a loved one, and prepare you and your family for what's to come. The “Before” checklist breaks down the updating of your financial records so it doesn't feel so overwhelming and you are more likely to take action on implementing the necessary steps. It will help you save time, stress, money and preserve family relationships in the end.

The “After” checklist will help you get your financial house back in order. Having a process, documented notes, and an ordered action list can help you move forward with getting things updated while you and your family are recovering after the loss of a loved one.

The financial checklists are intended to get you thinking and talking to the right people and taking actions before and after the loss of a loved one. If you are trying to prepare for what's to come or you are facing the loss of a loved one, these books will help ease the transition.

Target Audience

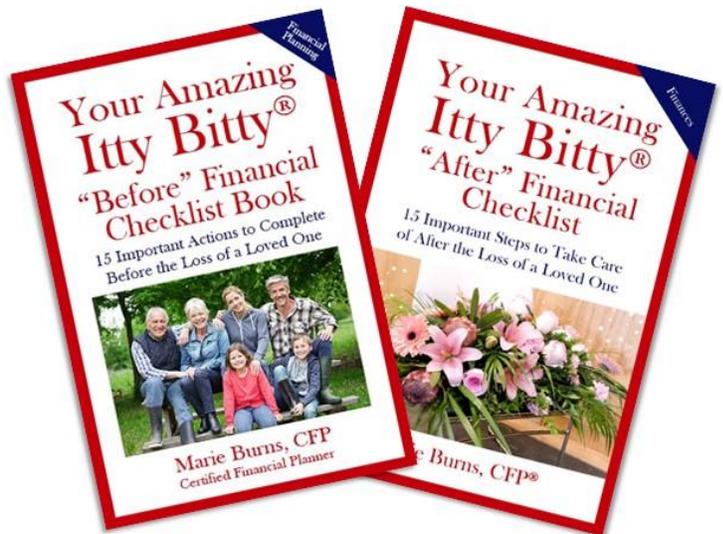
WHO SHOULD READ



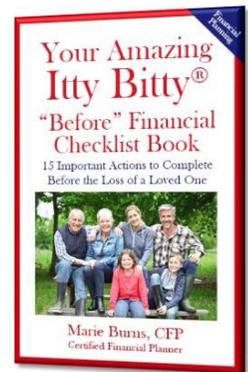
- Anyone starting to help aging parents
- Anyone who has lost a spouse, parent, friend or other family member
- Individuals or couples who are retired and beginning to think about the next phase of life
- Families aware of a terminal condition and trying to prepare for what's to come
- People of any age trying to get their financial house in order

BOOK BENEFITS

- Save time, stress and money
- Avoid additional costs/delays of probate
- Learn who to notify, what professionals to speak with and what to talk to them about
- Get financially organized
- Understand and plan for final wishes
- Preserve family relationships



Book Excerpt



"Before" Step 10

Homework: Who Gets What?

Remember that each beneficiary designation dictates the distribution of each account so make sure all of your beneficiary designations are current. Too often we list someone - then, life changes, people pass away, or relationships change, so your beneficiary designations may need to change too.

Beneficiary Designations

- The best person to give you advice on naming beneficiaries is your legal advisor. He/she understands the big picture of your estate and knows what it is you are trying to accomplish.
- Discuss with your attorney the option to add "per stirpes" or "by rights of representation" wording (the ability to include grandchildren if their parents predecease you) to a beneficiary designation.

Too often, people misunderstand and believe that once their will or trust is drafted, that takes care of everything and that beneficiary designations don't matter because they have it all spelled out in their will or trust. But remember, a beneficiary designation acts like a little mini-will in dictating where each account gets distributed, so the account never references the will or trust for distribution instructions at all on most accounts unless the will or trust is listed as the beneficiary (and that may not be the best practice for tax reasons) or goes through probate because there was no beneficiary listed.

You need to consult your legal advisor for beneficiary designation recommendations - don't guess!

Interview Questions

1

Who will benefit most from this information?

2

Why is it important to get our financial records organized and up to date?

3

What are a few helpful tips for getting financially organized?

4

What are the most common mistakes people make related to this subject area?

5

What is a good way to bring up this subject with our aging parents?

6

Why is National Estate Planning Awareness Week important and what should we know about it?

7

What is the first step someone needs to take for the "before" and the "after"?

8

How can people take the overwhelm out of planning for certain life events?

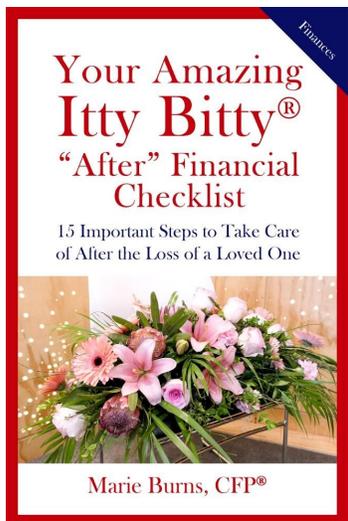
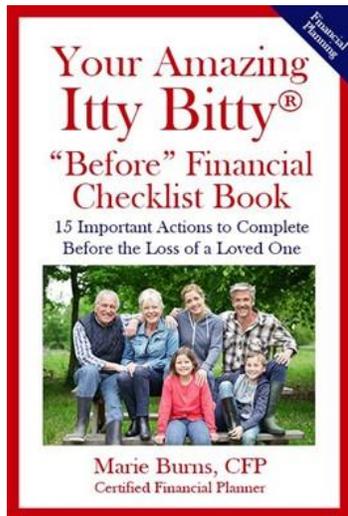
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How do people know if they are on the right track for this type of financial planning?

10

Where can people go for more information or if they have more questions?

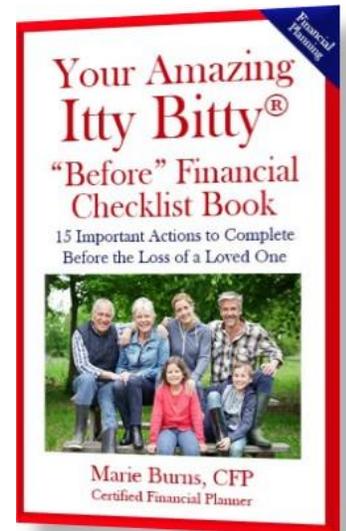
STORY IDEAS FOR REPORTERS:



- 1. National Estate Planning Awareness Month/Week:** What is NEPAM/W and why should we aware?
- 2. Estate planning:** What are the things to do and think about before seeing an estate planning attorney?
- 3. The morbid details:** Deciding what will happen to your "things" when you die sounds gloomy. Why is it important?
- 4. What so many late celebrities got wrong:** Celebrities are still in the news years after their death, but it's not about the legacy they thought they would leave behind. How does the average family plan properly so their estate is not a mess when they are gone?
- 5. Expect the unexpected:** Is your family ready for you to unexpectedly be in the hospital or suddenly pass away?
- 6. Where there's a will there's a way:** 60 percent of Americans die without a will. Why are beneficiaries so important?
- 7. It's a family affair:** You've heard that money changes people, it's true.

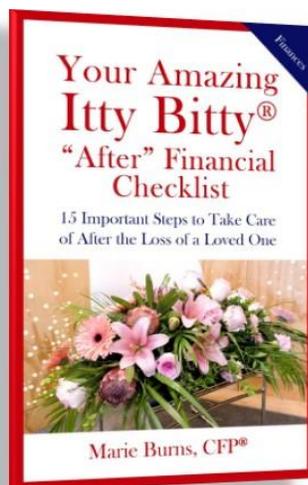
Reviews

"Marie has provided two amazingly simple, but well-defined booklets that answer the BIG questions for many who are anticipating, or have lost a loved one. I found them insightful because they took what felt like giant fears of "unknown tasks," out of my journey as a new widow." [Doreen Hanna, Founder of It's A New Day Widow's Ministry](#)



"Marie is very knowledgeable, organized and professional! She shared much needed insight and information on topics we will all eventually face. Very helpful!"
[New Adventures in Learning, Sun Lakes, AZ](#)

"Marie's approach is that of a trusted family friend – she compassionately walks you through every step that needs to happen and when. This book completely overcomes the feeling of overwhelm."
[Arlene Pedersen](#)



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Finances

Your Amazing Itty Bitty®
“Before” Financial Checklist

15 Important Actions to Complete Before the Loss of a Loved One

Marie Burns, CFP®

The cover features a red border and a blue diagonal banner in the top right corner with the word 'Finances' in white. The title is in a large, red, serif font. Below the title is a black and white photograph of a family of six (two grandparents, two parents, and two children) sitting on a wooden bench outdoors. At the bottom, the author's name 'Marie Burns, CFP®' is written in red.

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Finances

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“After” Financial Checklist

15 Important Steps to Take Care of After the Loss of a Loved One

Marie Burns, CFP®

The cover features a red border and a blue diagonal banner in the top right corner with the word 'Finances' in white. The title is in a large, red, serif font. Below the title is a photograph of a large, vibrant floral arrangement with pink lilies and white flowers. At the bottom, the author's name 'Marie Burns, CFP®' is written in red.

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