Widowed Community

Weekly Wealth Reminder™ Sample (Week #1)

	Reminders
☐	**Car/Truck - Check Fluid Levels:** Your car may use up to seven different fluids to keep it running and operational; radiator fluid, power steering fluid, brake fluid, engine oil, automatic transmission fluid, air conditioning coolant and windshield cleaning fluid. Except for air conditioning coolant, I check fluids monthly to make sure levels are appropriate. Older or high mileage vehicles may require more frequent checks. Each fluid has its own requirement for replacement. Some manufacturers do not provide a schedule to flush or replace the fluid. Engine oil is listed as a separate reminder in these posts because it's changed more often than the other fluids.
☐	**Obtain & Review Your Credit Report:** Review your second of three free credit reports (perhaps Equifax at www.Equifax.com this cycle). Once a year the federal government allows you to obtain a free credit report from each of the three main credit reporting agencies. By spreading out the three reports at four-month intervals, you have a way to review your credit history every four months for free. Once accessed, review your contact information for accuracy and make sure no incorrect contact information was added recently to your report. Review all open accounts for any that you may not have opened. Review payment history to make sure no payments were missed.
☐	**Review Employee Benefits:** Each Fall employees normally have a chance to review the benefits provided by their employers. Health care, life, disability and long-term care insurance and other benefits should be reviewed to make sure your choices match your financial and family situation.

I hope you find this weekly reminder valuable. Please visit www.WidowedCommunity.com for additional tools such as the Financial Blog, Immediate Checklist, Starter Kit and the Financial Advisor Evaluation & Selection Tool (which includes the Dear Financial Advisor Letter!).

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Important Note: This Reminder provides general educational information and is not specific advice for your situation which may differ.

Widowed Community

More Financial Tools for the Recently Widowed

Immediate Checklist

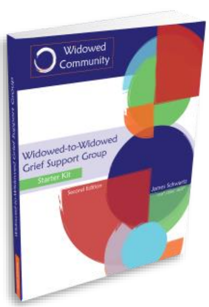
A checklist covering the critical issues normally faced by widows and widowers during the first three days after the death of their spouse or partner

Widowed Community Financial Blog

Weekly posts providing financial knowledge, wisdom and know-how for high net worth widows and widowers

Financial Advisor Evaluation & Selection Tool

A thorough list of key questions (and preferred answers) to help the widow or widower pick a professional, planning-oriented financial advisor. Includes the Dear Financial Advisor Letter!



Starter Kit

Everything you need to start your own Widowed-to-Widowed Grief Support Group