

Meeting with your support team for the first time

Financial decision-making as a widow can feel overwhelming and leave you wondering if you are making the right choices and moving in the right direction. Leaning on your team of financial life support can help alleviate those feelings of uncertainty and provide peace of mind.

- Your financial support team should include (at least) a financial advisor/planner, a CPA, an estate planner, and an insurance agent.
- Remember that your team is there to support you. You should feel comfortable reaching out at any time to ask questions.

How To: Prepare for your first meeting

Meeting with your support team for the first time can feel intimidating. Remember that you don't have to have everything figured out in advance; that is what they are there to help you with. Here are a few tips to help you prepare:

- **Make a list of your questions.** All questions should be welcome, and keeping a list will ensure that you don't forget anything you want to ask.
- **Gather and bring your documents and paperwork.** Bank statements, tax returns, insurance policies: bring everything you can, and your team can help you sort through it. The more information they have, the more they will be able to assist.
- **Think about your goals.** Your team is there to help you get where you want to go. If you have ideas about the objectives that are most important to you, that will help them point you in the right direction.

TIP:

Your financial advisor can help coordinate your support team, ensuring that they are working together and aligned in their advice to you.

RESOURCES

["5 Questions to Ask When Selecting an Advisor"](#)



Learn how to advocate for yourself. Do research on benefits. You have to do the work to ensure you are getting what you need."

~ Ellen

OTHER TOPICS

- Documents you need to collect and where to get them
- Figuring out your monthly budget: income, spending, saving
- Putting a new estate plan in place