

# What to Do Now

**Set Review Meetings** -- Call your financial planner, investment advisor, broker, insurance agent, accountant and attorney and get on their calendars. Having an appoint creates a deadline which forces you to act. This is good.

**Get Organized** -- Know what you have, where it is and how much it's worth. Gather statements, receipts and any other pertinent information. Organize it in easy-to-see file folders so you can access it for taxes or any other purpose. Use computer programs such as Quicken or record-keeping services on Internet sites.

**Review Your Budget** -- If you need money form investments, program your withdrawals now. If you are adding to investments, plan those deposits now. Work with your investment advisor.

**Review Your Investment Allocation** -- talk to your advisor(s). Are your objectives the same? Should you take profits? Should you make any changes in allocation?

**Review Your Insurance** -- Call your agent. Are your policies the right kind at the best price for the benefits you need? Are there any new risks that need insured or any old ones for which you no longer need insurance?

**Review Your Wills, Trusts, Living Wills, Powers of Attorney, etc.** -- Are your documents in order and do they still do what you want them to?