

DISABILITY CHECKLIST



Recent Disability?

Disability can have a significant impact on all aspects of life. Please reference this list for potential to-do items to consider in the event you experience a disability event.

Talk to your financial professional about:

- Contact your financial professional right away if you have a personal short or long term disability policy and you experience a disability event

Additional action items:

- Be sure to keep all medical records and documentation related to treatment for the disability
- Ensure your beneficiaries and any medical proxies are up to date on all policies, accounts, and legal documents
- In addition to any personal short or long term disability policies, you may qualify for social security disability. Be sure to explore all the appropriate government resources for the appropriate steps to file for government based disability payments
- Consider contacting a tax professional to discuss any and all tax implications of filing and receiving disability income