Navigating Life After Loss

After the loss of a loved one, dealing with financial and legal matters can be exhausting. We understand that grieving takes energy, and we want to help you make the transition from married life to widowhood on your timeline. While every couple, family, and eventually survivor's situation is unique, there are some common threads. We are here to help prioritize and deal with the details and the surprises that can crop up. We want to be your financial sounding board to provide the support you need to make the tough decisions. Global View Investment Advisors was founded on the principle of growing and preserving investors' wealth, and that continues to be our mission as we carry out our founder's legacy and protect yours.

ESTABLISHING THE FINANCIAL PICTURE

- Help with the transfer of ownership
- Coordinate with beneficiaries
- Net worth calculation
- Prepare Budget

BILL REVIEW AND PRIORITIZATION

- Identify what can be canceled or consolidated
- Determine which account names need to be updated

ANALYTICAL SUPPORT FOR MAJOR DECISIONS

- Real Estate Decisions
- Vacation home next steps
- Rental property
- School/college selections
- Care for elderly parents

OTHER CONSIDERATIONS

- Travel
- Connecting with Friends/Family
- Hobbies
- Work

You don't have to navigate this new journey solo. Our team is here to help.

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