The One-Page Post-Settlement Tracker

A tracker from *The 3am Book* — Chapter 24, Your Money, Your Rules

Check, double check, and don’t assume the professionals will do what you asked. Then check again.

Tick each item off as written confirmation arrives — this is the reader who doesn’t find out at the eighteen-month mark that something was missed.

Item	Done	Confirmed in writing
Will updated	■	■
Super death benefit nomination updated	■	■
Life insurance beneficiary updated	■	■
TPD / trauma / income protection beneficiary updated	■	■
Solicitor trust account funds released / invested	■	■
House and contents insurance in your name	■	■
Car insurance in your name	■	■
CGT event flagged with your accountant	■	■
PAYG instalments reset	■	■
Trust distribution / beneficiary nomination reviewed	■	■
Locks, alarm code, WiFi password changed	■	■
Other	■	■

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