



Marriage/ remarriage checklist

If you are considering marriage, newly married or getting remarried in the future, congratulations! Use the checklist below to help with the details occasioned by matrimony.

Review legal, financial, insurance and retirement plan effects of impending matrimony. Make changes as needed, including beneficiary designations and waiver or exercise of spousal rights. Add new spouse as an insured on casualty insurance policies where appropriate, and review scheduled coverage of property.

If minor children from a prior marriage are involved, agree as to financial responsibilities and child-rearing duties and roles.

Consider and adjust for tax and financial changes occasioned by matrimony. Notify employer of new tax filing status.

Review and execute any prenuptial agreement that may be appropriate.

If one spouse is changing surname, have driver's license, Social Security card, professional licenses and credit cards reissued in new name.

Discuss with marital partner and alter titles to real property, tangible personal property, bank accounts and investment accounts, as appropriate. Discuss any personal debt of either marriage partner that will be assumed by the marriage union. Make a budget for combined household expenses.

Review and change wills, trusts, business buyout agreements, living wills, powers of attorney and related documents as needed.

Plan for the consolidation of households, including disposition of duplicate items, and the acquisition or replacement of items.



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We're here to help you take action

You can reach out directly to your financial professional.

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