



Wealth is the ability to fully experience life.

Divorce

Divorce is an emotionally stressful time filled with fear of the unknown and worries about your financial well-being. This checklist can help you to realistically focus on your financial situation, which can aid in reducing your stress level. It's essential to take a look at budgeting, investing, retirement, and other financial planning issues during this significant life transition.

FINANCIAL FACTORS

- | | |
|---|--|
| <input type="checkbox"/> Current income and expenses | <input type="checkbox"/> Financial plan updates |
| <input type="checkbox"/> Future financial needs and budgeting | <input type="checkbox"/> Social security considerations <i>(if married 10 years or more)</i> |
| <input type="checkbox"/> Retirement accounts | <input type="checkbox"/> Tax consequences |
| <input type="checkbox"/> Pensions | <input type="checkbox"/> Arbitration vs. hiring an attorney |
| <input type="checkbox"/> Bank accounts | <input type="checkbox"/> Handling of Qualified Domestic Relations Order (QDRO) |

LEGAL DOCUMENTS

- | | |
|---|---|
| <input type="checkbox"/> Will | <input type="checkbox"/> Asset/account structure |
| <input type="checkbox"/> Power of attorney <i>(POA)</i> | <input type="checkbox"/> Health care directive |
| <input type="checkbox"/> Beneficiary updates | <input type="checkbox"/> Estate plan updates |
| <input type="checkbox"/> Asset titling | <input type="checkbox"/> Name change <i>(if applicable)</i> |

INSURANCE

- | | |
|---|---|
| <input type="checkbox"/> Health insurance | <input type="checkbox"/> Life insurance |
| <input type="checkbox"/> Dental insurance | <input type="checkbox"/> Long-term care insurance |
| <input type="checkbox"/> Vision insurance | <input type="checkbox"/> Car insurance |
| <input type="checkbox"/> Disability insurance | <input type="checkbox"/> Homeowner or renters insurance |

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