



CHECKLIST FOR THE RECENTLY DIVORCED

We know that starting over again can be daunting and overwhelming. Here is a checklist of items to take care of for securing your financial future.

#	ITEMS	<input checked="" type="checkbox"/>
1	Consult with a certified financial planner to prepare a comprehensive financial plan and review your investments.	<input type="checkbox"/>
2	Rollover or transfer retirement assets according to your divorce decree and/or QDRO	<input type="checkbox"/>
3	Review and/or change beneficiaries on all retirement accounts	<input type="checkbox"/>
4	Make sure you have several copies of your Judgement or Decree and Marital Settlement. You may need them for any transfer of property, accounts, debts etc.	<input type="checkbox"/>
5	Retitle assets, including real estate and automobiles	<input type="checkbox"/>
6	Open new credit cards, checking & savings accounts in your name only	<input type="checkbox"/>
7	Get a copy of your credit report (consider signing up for the credit monitoring services)	<input type="checkbox"/>
8	Make name and address change notifications	<input type="checkbox"/>
9	Create or update your will / establish trust with power of attorney for health and financial directives	<input type="checkbox"/>
10	Purchase or change life insurance required by your divorce decree to cover child support or spousal maintenance	<input type="checkbox"/>
11	Contact the Social Security Administration for eligibility information if you are 62 or older and were married for 10 or more years (www.ssa.gov)	<input type="checkbox"/>
12	Contact the VA about veteran's benefits, if applicable (www.vba.va.gov)	<input type="checkbox"/>
13	Get health insurance for yourself. Apply for COBRA	<input type="checkbox"/>
14	Create a budget and monitor your spending. Build an emergency reserve	<input type="checkbox"/>
15	Take an inventory of all personal (non-marital) property	<input type="checkbox"/>
16	Change all passwords to your online accounts	<input type="checkbox"/>

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This is a preliminary guide and is not intended to be a comprehensive list of things to consider. Please consult your attorney, tax professional and financial advisor for a more customized plan for your specific situation.

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#	PERSONAL ITEMS	<input checked="" type="checkbox"/>
17		<input type="checkbox"/>
18		<input type="checkbox"/>
19		<input type="checkbox"/>
20		<input type="checkbox"/>
21		<input type="checkbox"/>
22		<input type="checkbox"/>
23		<input type="checkbox"/>
24		<input type="checkbox"/>
25		<input type="checkbox"/>

The team at Lilani Wealth Management is here to help you prepare a comprehensive financial plan and review your investments (Item #1).

Our approach to financial planning is holistic, interactive, and collaborative. During the initial discovery process, we delve beyond the numbers to gain a comprehensive understanding of your current financial situation. We take the time to learn about your personal values, priorities, concerns, and goals to truly understand what is most important to you and your family. This thorough understanding allows us to tailor our financial strategies to align with your unique vision and objectives, ensuring that every aspect of your financial plan resonates with your life aspirations and family legacy. By fostering a collaborative relationship, we work together to create a financial roadmap that not only addresses your immediate needs but also paves the way for a secure and fulfilling future.

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