



Wealth is the ability to fully experience life.

## Getting Married

While there are many legal and financial benefits to getting married, it's an important decision that requires careful consideration. It's helpful to be aware of the expectations you're bringing into the marriage. This checklist provides key discussion points to ensure you're on the same page before tying the knot.

### KEY DISCUSSIONS PRIOR TO GETTING MARRIED

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|--|--|
| <input type="checkbox"/> Premarital counseling                                   | <input type="checkbox"/> Family obligations              |
| <input type="checkbox"/> Outstanding debt  | <input type="checkbox"/> Division of household labor     |
| <input type="checkbox"/> Beliefs and values (children, religion, politics, etc.) | <input type="checkbox"/> Location - where will you live? |
| <input type="checkbox"/> Personal goals and careers                              |  |

### WEDDING PLANNING

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- |  |   |  |   |
|--|---|--|---|
| <input type="checkbox"/> Venue                     | <input type="checkbox"/> Ceremony structure |  |   |
| <b>Budget - who pays for what?</b>                 |   |  |   |
| <input type="checkbox"/> Rehearsal dinner          | <input type="checkbox"/> Floral             | <input type="checkbox"/> Photographer  | <input type="checkbox"/> Entertainment          |
| <input type="checkbox"/> Reception food & beverage | <input type="checkbox"/> Stationery         | <input type="checkbox"/> Wedding rings | <input type="checkbox"/> Parking/transportation |
| <input type="checkbox"/> Attire                    |   |  |   |

### MONEY MATTERS

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|--|---|
| <input type="checkbox"/> Budget - managing finances        | <input type="checkbox"/> Bill sharing         |
| <input type="checkbox"/> Asset/account structure           | <input type="checkbox"/> Insurance planning   |
| <input type="checkbox"/> Joint or individual bank accounts | <input type="checkbox"/> Family board meeting |

### IMPORTANT DOCUMENTS

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- |  |  |
|--|--|
| <input type="checkbox"/> Power of attorney (POA) | <input type="checkbox"/> Beneficiaries       |
| <input type="checkbox"/> Will                    | <input type="checkbox"/> Titling of assets   |
| <input type="checkbox"/> Healthcare directive    | <input type="checkbox"/> Privacy waiver form |
| <input type="checkbox"/> Prenuptial agreement    |  |

### RESOURCES

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- Financial Peace University ([www.financialpeace.com](http://www.financialpeace.com))

Teresa Hart | 708 E. Kay Avenue, Suite 3, Mitchell, SD 57301 | (605) 292 - 0202 | [teresa@hartfinancial.net](mailto:teresa@hartfinancial.net)

Sue Benedict | 7304 50th Avenue South, Sabin, MN 56580 | (701) 561 - 0192 | [sue@hartfinancial.net](mailto:sue@hartfinancial.net)

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