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Life Event Planning Checklist

Getting Married

- ☐ Create New Projections with Updated Cash Flow
- ☐ Review Updated Liquidity Needs
- ☐ Review and Update Financial Goals – New Short and Long-Term Goals Because of Marriage
- ☐ Pre-Nuptial Agreement
- ☐ Make Sure All Estate Documents are Updated
- ☐ Take a Look at Balance Sheet and Update Assets and Liabilities
- ☐ Decide on Titling of Accounts – Joint or Separate?
- ☐ Decide on Beneficiaries for Accounts
- ☐ Review Tax Situation with CPA
- ☐ Review Insurance to Make Sure There's Sufficient Coverage
- ☐ Review Future Spouses Investments, 401(k), Etc.
- ☐ Review all of these items with your financial advisor