MARRIAGE CHECKLIST

Newly Married?

Congratulations! Marriage can introduce new financial needs. Please reference this list for potential to-do items once you tie the knot.

Talk to your financial professional about:

- ☐ Formulating a new comprehensive financial plan including investment strategies and life insurance needs

Additional action items:

- ☐ Update your accounts to add your spouse as a beneficiary
- ☐ Update any account ownership and account accessibility permissions
- ☐ Obtain and keep a copy of your marriage license in a safe place
- ☐ Talk to a professional about creating an estate plan
- ☐ Talk to a professional about tax implications and possible deductions