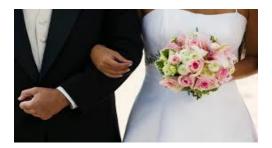


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Life Event Planning Checklist

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 Accounts or Separate?
- \Box Decide on Beneficiaries for Accounts
- \Box Review Tax Situation with CPA
- □ Review Insurance to Make Sure There's Sufficient Coverage
- □ Review Future Spouse's Investments, 401(k), Etc.
- \square Review all of these items with your financial advisor



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