



795 Franklin Avenue, Bldg. C, Suite 202, Franklin Lakes, NJ 07417 • 201-891-1130

Life Event Planning Checklist

Newly Divorced

- Create a New Budget
- Review Financial Situation (Loss of Income, Change in Expense, Change in Assets)
- Create New Short and Long Term Financial Goals
- Review Life, Health, and Disability Insurance
- Update Estate Documents to Remove Ex-Spouse
- Reminder You May Be Eligible to Receive Spousal Social Security Benefits
- Review Account Titling to Make Sure Ex-Spouse is Removed from All Accounts
- Remove Ex-Spouse as Beneficiary on Accounts (Unless Court Required)
- If Minor Children Are Involved, Review College Situation and Potential Need for Funding
- Review all of these items with your financial advisor



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