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



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