

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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