

# 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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