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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 all of these items with your financial advisor