

Celebrating Over 30 Years...

...and Supporting You for the Next 30

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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